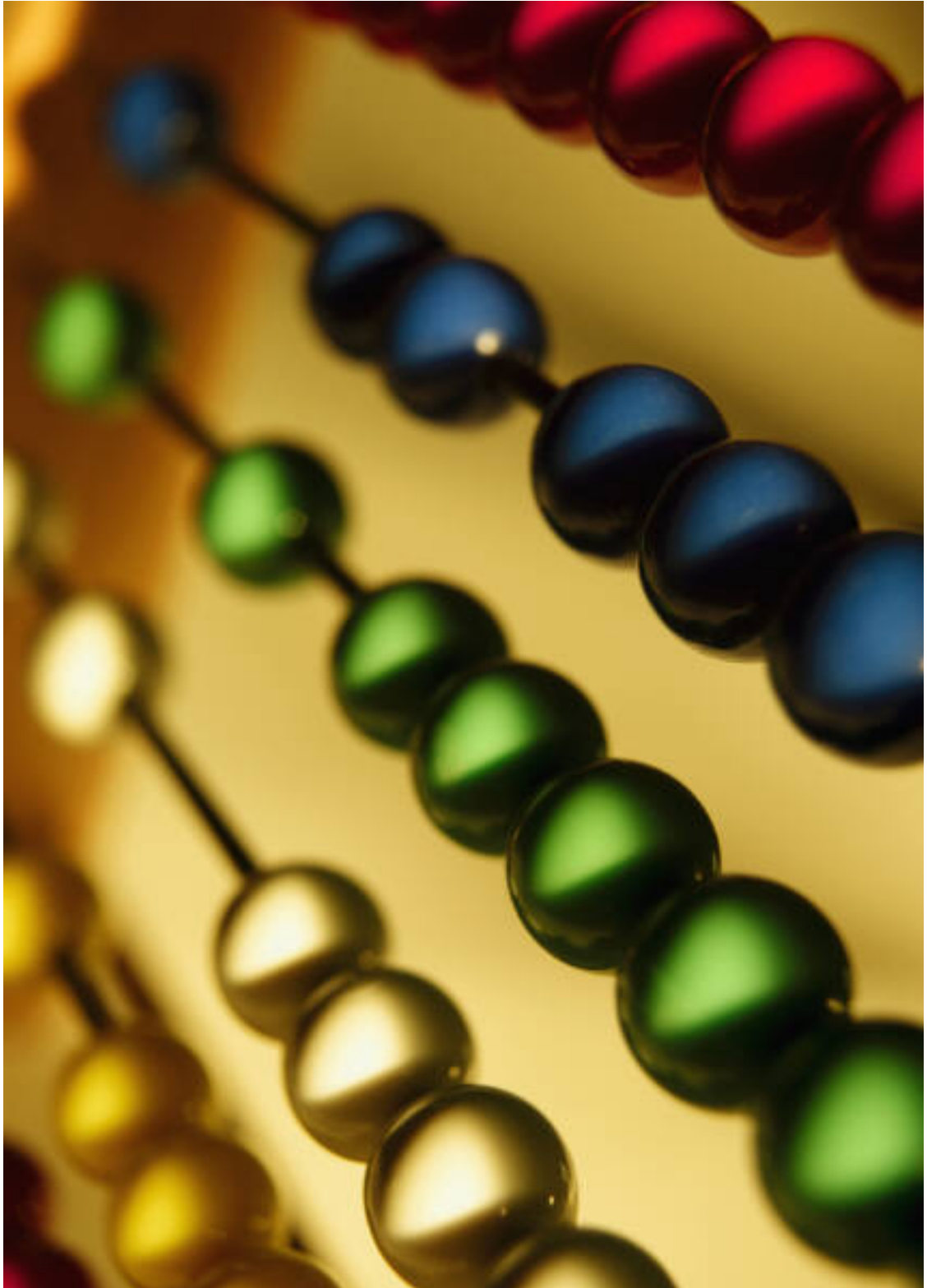


Bi-Weekly Report as of July 9, 2004



FSA Performance Plan – FY2004

SUMMARY

GREEN LIGHT

- The FISAP testing has been completed and corrections are being incorporated into the eCB system. It is expected that the FISAP software will be issued to schools next week. *(Project 6 - Administer Campus-Based (eCB) activities)*
- The new Spanish language Loan Consolidation Website was launched on July 1, 2004. This new feature will make services more accessible to Direct Loan borrowers in repayment. *(Project 14 - Implement plan to provide high quality customer service to the Direct Loan portfolio)*
- All applications for the 2004-2005 LEAP/SLEAP award year are processed. Grant award notifications were forwarded electronically. There are five states and three territories that did not apply for 2004-2005 funding. New Mexico, one of the three states, has been granted an exception to the deadline due to turnover at the state level. This nearly completes Project 21 – *(Perform LEAP/SLEAP activities)*.

YELLOW LIGHT
















































- Although recommendations were made on June 2 regarding the award of a new training contract, ASEDS continues to await the award of that contract. *(Project 11 - Develop and deliver program and technical training for schools through a combination of videoconferences, web-based training, and classroom experiences).*
- ASEDS management decided to change the status of Project 71 *(Reengineer EDEExpress)* to Yellow due to the fact that the original target completion date was missed, although the Project is currently on track to be completed by the amended target date of September 30, 2004.
- Several Projects continue to be reported as Yellow:
 - Project 8: Expand eZAudit initiative.
 - Project 29: Sustain and improve timely reconciliations.
 - Project 54: Deliver workforce development and support programs.
 - Project 74: Implement Leadership Excellence Development training.

RED LIGHT

- The contract for the review of internal controls on FMS has not been awarded. A panel has been established and staff is currently rating proposals. *(Project 27 – Perform internal control reviews to enhance financial management)*























ACTION PLAN STATUS AT A GLANCE

as of July 9, 2004

FSA No.	Indicator	Status
1	IMPLEMENT STUDENT AID AWARENESS INITIATIVES	
1.1	Leverage partnership activities to disseminate FSA information	
1.2	Publish accurate and timely information that meets the needs of our audience	
1.3	Disseminate information directly to target audience	
1.4	Respond accurately and timely to requests	
1.5	Reach customers through Student Aid on the Web	
2	IMPROVE CUSTOMER INTERACTIONS/CUSTOMER SERVICE CALL CENTER	
2.1	Monitor customer feedback to improve services	
3	CONDUCT APPLICATION PROCESSING (CPS, FOTW, PIN Site, IADD, PM)	
3.1	Implement application	
4	PROVIDE EDEXpress APPLICATION MODULES	
4.1	Release application module	
4.2	Release Common Origination and Disbursement module	
5	PROCESS PELL & DIRECT LOAN TRANSACTIONS THROUGH COD	
5.1	Issue COD software release	
5.2	Issue COD SOO	
6	ADMINISTER CAMPUS-BASED (eCB) ACTIVITIES	
6.1	Prepare list of schools that do not submit FISAP; call schools to ensure compliance prior to tentative award notification	
6.2	Notify schools of tentative awards	
6.3	Call remaining schools that have not submitted FISAPs or that need to correct FISAPs prior to required closure of database	
6.4	Issue final awards to schools	
6.5	Issue FISAP software release	
7	UPGRADE POSTSECONDARY EDUCATION PARTICIPATION SYSTEM (PEPS)	
7.1	Complete Oracle 9i Upgrade	
7.2	Upgrade Windows NT server that houses the E-App	
8	EXPAND eZAUDIT INITIATIVE	
8.1	Commence contract start-up	
8.2	Complete first full cycle of processing (all school types)	
8.3	Improve audit review component of compliance activities by increasing the e-submission rate to 95%	
9	ENHANCE PROGRAM MONITORING AND OVERSIGHT (APP & DEL SERV)	
9.1	Meet or exceed audit resolution rate of 95% by the end of the fiscal year	
9.2	Continue to measure school monitoring to assess overall compliance trends	
9.3	Conduct School Relations initiatives	
9.4	Conduct Experimental Sites initiative	
9.5	Administer the Quality Assurance program	
9.6	Conduct vulnerability assessment	
10	PRODUCE SCHOOL PUBLICATIONS AND MATERIALS	
10.1	Annually update and disseminate the Federal Student Aid Handbook	
10.2	Update and disseminate Direct Loan Program publications	
11	DEVELOP & DELIVER PROGRAM AND TECHNICAL TRAINING FOR SCHOOLS	
12	TRANSITION TO COMMON SERVICES FOR BORROWERS (CSB)	
13	ENHANCE PROGRAM MONITORING AND OVERSIGHT (BORROWER SERVICES)	
13.1	Default Recovery Rate on FSA-held portfolio 9.5% or more	
13.2	Update FSA-wide risk management and default prevention inventory.	
13.3	Complete the work on the implementation of the life-time default rate measure.	
13.4	Identify and enhance current delinquency/default prevention tools for the DLProgram	
13.5	Conduct vulnerability assessment	






































ACTION PLAN STATUS AT A GLANCE

as of July 9, 2004

FSA No.	Indicator	Status
14	IMPLEMENT HIGH QUALITY CUSTOMER SERVICE TO THE DL PORTFOLIO	
15	IMPLEMENT PLAN TO IMPROVE CONTRACTOR OVERSIGHT TO DL CONSOLIDATION OVERPAYMENTS/UNDERPAYMENTS	
16	PERFORM NSLDS MAINTENANCE/OPERATIONS ACTIVITIES	
16.1	Perform cohort default rate calculations, send, and post	
16.2	Prepare/send GA fee calculations. Review Forms 2000 reasonability data	
16.3	Review, evaluate, prepare GA NSLDS data integrity improvements reports	
16.4	Make enhancements to Loan Processing and Issuance Fee (LPIF) process for rate changes	✓
16.5	Participate in the formulation of school cohort default rate initiatives	✓
16.6	Provide monitoring functionality of GA and Lender reasonability on a monthly basis	
16.7	Upgrade Data Prep Software to be compliant with Windows 2000 and XP	✓
16.8	Implement Education Credit Management Corporation (ECMC) file format changes	✓
17	RE-COMPETE CONTRACT FOR NSLDS MAINTENANCE/OPERATIONS	✓
17.1	Award new contract	✓
17.2	Monitor and manage transition to new contractor	✓
18	RE-COMPETE CONTRACT FOR FP DATA MART MAINTENANCE/OPERATIONS	✓
18.1	Award new contract	✓
18.2	Monitor and manage transition to new contractor	✓
19	PERFORM MAINTENANCE/OPERATIONS ACTIVITIES FOR THE FP DATA MART	
19.1	Quarterly status report on ways to improve effectiveness/efficiency of Data Mart review process	
19.2	Quarterly evaluation of use and value added to the guaranty agency and lender review processes	
19.3	Monitor Data Mart feeds to provide accurate, concise and timely data to users	
20	PERFORM FINANCIAL PARTNERS PORTAL OPERATIONS ACTIVITIES	
20.1	Monitor and evaluate web page hits to drive future postings to portal	
20.2	Maintain current and relevant information to financial partners' user community	
20.3	Obtain/evaluate feedback from financial partners' user community on value of information posted on the Financial Partners Portal	
21	PERFORM LEAP/SLEAP ACTIVITIES	
21.1	Review, evaluate, reconcile, and prepare performance reports	✓
21.2	Prepare and submit clearance paperwork	✓
21.3	Review/approve applications from states. Obligate, generate, and mail grant award notifications	
22	PERFORM VOLUNTARY FLEXIBLE AGREEMENT (VFA) ACTIVITIES	
22.1	Perform cost neutrality analysis and provide results	✓
22.2	Prepare performance measure assessment and benchmarking reports	
22.3	Evaluate new applications for VFA	
22.4	Foster effective working relations with guaranty agencies during scheduled site visits	
23	PERFORM MAINTENANCE/IMPROVEMENTS TO THE FP ELECTRONIC RECORDS MANAGEMENT (ERM) SYSTEM	✓
23.1	As appropriate, integrate ERM work with other FSA business units	✓
23.2	Analyze and evaluate the current use of the ERM system to identify improvements	✓
24	PROMOTE EFFECTIVE/EFFICIENT COMMUNICATIONS INTERNALLY & EXTERNALLY	cancelled
24.1	Coordinate and enhance communications within Financial Partners and externally	cancelled
24.2	Hold quarterly checkpoints for all areas of FP service concerning communications	cancelled
25	ENHANCE PROGRAM MONITORING & OVERSIGHT (FP)	
25.1	Participate and provide Financial Partners Channel support for ED audit	
25.2	Prepare and conduct program reviews of guaranty agency and lenders/servicers	

ACTION PLAN STATUS AT A GLANCE

as of July 9, 2004

FSA No.	Indicator	Status
25.3	Analyze and collect third-party audit findings	
25.4	Utilize GA/lender scorecards to reduce risk and improve review process	
25.5	Partner with guaranty agency community on the Common Review Initiative (CRI)	
25.6	Conduct vulnerability assessment	
26	SUSTAIN CLEAN AUDIT OPINION, ADDRESS MATERIAL WEAKNESSES AND REPORTABLE CONDITIONS IDENTIFIED IN ANNUAL FINANCIAL STATEMENT AUDITS	
27	PERFORM INTERNAL CONTROL REVIEWS TO ENHANCE FINANCIAL MGMT	
28	FINALIZE FY 2002 & FY 2003 COST ACCOUNTING MODEL AND DEVELOP BASELINE FY 2002 UNIT COSTS	
29	SUSTAIN/IMPROVE TIMELY RECONCILIATIONS & IMPLEMENT OTHER PROCEDURES TO COMPLY WITH FY 2004 ACCELERATED REPORTING REQUIREMENTS	
30	MANAGE FMS OPERATIONS	
31	DEVELOP & DEPLOY ENTERPRISE PERFORMANCE TEST ARCHITECTURE	
32	PROVIDE ENTERPRISE & DATA ARCHITECTURE MANAGEMENT	
33	PROVIDE SECURITY & PRIVACY SUPPORT TO FSA BUSINESS UNITS	
34	PROVIDE INTEGRATED TECHNICAL ARCHITECTURE (ITA) & ENTERPRISE APPLICATION INTEGRATION (EAI) MAINTENANCE AND PRODUCTION SUPPORT	
35	SUPPORT THE FSA IT ASSETS AT THE VDC WITH LINES OF SERVICE	
36	CONTINUE ENTERPRISE QUALITY ASSURANCE PROGRAM TO SUPPORT THE FSA CIO IN CONDUCTING SYSTEMS ASSESSMENTS/EVALUATIONS	
37	SUPPORT ED, CUSTOMERS AND BUSINESS PARTNERS BY PARTICIPATING IN THE PRESIDENT'S MANAGEMENT AGENDA E-GOVERNMENT INITIATIVES	
37.1	Release GovLoans Gateway	
38	PROVIDE HIGH QUALITY INFORMATION, RESEARCH AND INFORMAL PROBLEM RESOLUTION SERVICES TO STUDENT LOAN BORROWERS AND OTHER PARTICIPANTS IN STUDENT AID PROGRAMS	
39	CONDUCT REAUTHORIZATION ACTIVITIES	
40	POLICY LIAISON PLACEHOLDER	
41	PLAN AND MANAGE FSA CONFERENCES	
42	MANAGE, DEVELOP AND UPDATE CONTENT FOR FSANet	
43	MANAGE CONTROLLED CORRESPONDENCE FUNCTIONS	
44	DEVELOP & IMPLEMENT INTERNAL/EXTERNAL COMMUNICATIONS STRATEGY	
45	MATURE ENTERPRISE-WIDE PROCUREMENT PLAN	
45.1	Complete market research to resolve plan issues	
45.2	Synch Plan w/BIG End State Vision	
46	DEVELOP ACQUISITION WORKFORCE	
47	IMPLEMENT ENTERPRISE CONTRACT PERFORMANCE MONITORING MEASURES AGAINST NEW SYSTEMS CONTRACT AWARDS	
47.1	Incorporate CSB into enterprise process	
47.2	Incorporate Front-End Business Integration Systems (FEBI) into enterprise process	
48	CONTINUOUSLY UPDATE AND MONITOR PROCUREMENT INTERNAL CONTROLS	
48.1	Establish monitoring and reporting process for government furnished property	
48.2	Establish reporting process to monitor vendor performance	
49	INCREASE CONTRACT DOLLARS AWARDED TO SMALL BUSINESSES	
49.1	Increase dollars awarded directly to small businesses	cancelled
49.2	Increase dollars awarded through large business primes to small business subs	cancelled
50	CONTINUE TO IMPLEMENT INTEGRATED PROJECT MANAGEMENT OVERSIGHT FOR FSA'S SYSTEM INTEGRATION ACTIVITIES	
51	EVALUATE & IMPLEMENT SELECTED PROJECT MANAGEMENT STANDARDS BASED ON THE SOLUTION LIFE CYCLE	

ACTION PLAN STATUS AT A GLANCE

as of July 9, 2004

FSA No.	Indicator	Status
52	RESTRUCTURE INTEGRATION LEADERSHIP SUPPORT TO TRANSITION TO FSA STAFF	NR
53	PREPARE & CONTINUALLY MONITOR/REPORT ON THE ACCOMPLISHMENTS OF THE HIGH RISK PLAN	NR
54	DELIVER WORKFORCE DEVELOPMENT AND SUPPORT PROGRAMS	Y
54.1	Continue Intern Program	G
54.2	Conduct FSA Orientation	G
54.3	Implement results of One-ED Competitions	Y
54.4	Update Skills Catalog/Learning Tracks	G
54.5	Implement Workforce Alignment Strategy	Y
54.6	Update FSA Human Capital Plan	NR
55	PERFORM FACILITIES MANAGEMENT ACTIVITIES	✓
55.1	Implement facilities needs	✓
55.2	Coordinate security needs	✓
55.3	Administer records management	✓
55.4	Coordinate the distribution of the Transit-Benefit program	✓
56	REVIEW CREDIT REFORM ESTIMATES	G
57	DEVELOP TRIAL BALANCE CAPABILITY FOR COD AND CSB	✓
58	SUPPORT THE IMPLEMENTATION OF ORACLE FEDERAL FINANCIALS RELEASE 11i	G
59	IMPLEMENT AUTOMATED BUDGET FUNDING ENTRY SOLUTION	G
60	IMPLEMENT FORMS 2000 ADDITIONAL ENHANCEMENTS	✓
61	IMPLEMENT ENTERPRISE DATA STRATEGY INITIATIVES	NR
61.1	Map current state and future state business flows of data	✓
61.2	Develop requirements and initial design for common identifiers for schools and students	✓
61.3	Develop an integrated data warehouse and Data Mart strategy	✓
61.4	Develop technical standards, conventions and data management guidelines	✓
61.5	Determine current data quality and establish a target state plan and quality assurance process	✓
61.6	Develop an enterprise-wide extensible markup language (XML) technical architecture framework to enhance data sharing and standardization with our external customers	✓
61.7	Continue to build on Phase I by developing a detailed vision on FFEL/enrollment data flow, gaps/impact of Common Services for Borrowers (CSB), electronic Case Management Oversight (eCMO), NSLDS and electronic Campus-based systems	G
61.8	Conduct market research to validate the feasibility of the target conceptual design	✓
61.9	Develop the detail Data Quality Execution Plan	G
61.10	Develop a holistic XML Management Plan	G
61.11	Implement SSIM as a pilot on renewal applicants	G
62	BEGIN THE IMPLEMENTATION OF COMMON SERVICES FOR BORROWERS (CSB)	Y
62.1	Award Contract	✓
62.2	Begin implementing Phase I of the FSA-approved transition plan	Y
63	IMPROVE SCHOOL PARTNER OVERSIGHT	G
63.1	Implement Integrated Partner Management (IPM) system	G
63.2	Develop Consolidated requirements for IPM system	✓
63.3	Develop enrollment high-level design	✓
63.4	Develop access high-level	✓
63.5	Develop Routing ID (RID) high-level design	✓
63.6	Select competitively a vendor to perform the conceptual design and development of the IPM system	G
63.7	Begin requirements gathering for eCMO	✓
63.8	Procure the design of a workflow tool for SEC	G
64	IMPROVE THE ACCURACY OF APPLICANT DATA	✓

ACTION PLAN STATUS AT A GLANCE

as of July 9, 2004

FSA No.	Indicator	Status
64.1	Improve the effectiveness of verification	✓
64.2	Restructure CPS to become a multi-year database	✓
64.3	Implement ISIR Data Mart	✓
65	CREATE A TARGET STATE VISION OF A FRONT END BUSINESS INTEGRATION (FEBI)	✓
65.1	Conduct market research	✓
65.2	Issue CPS Statement of Objective (SOO)	✓
66	RE-ENGINEER NSLDS (PENDING DATA STRATEGY OUTCOME)	cancelled
67	PREPARE TO IMPLEMENT IRS DATA MATCH	G
68	CONTINUE LEARNING COUPON PROGRAM	NR
69	PROVIDE CAREER ZONE SERVICES	G
70	INCREASE STUDENT FINANCIAL AID PROGRAM AWARENESS	G
70.1	Expand federal student aid awareness and outreach program	G
70.2	Develop and implement long-term mass marketing strategy	G
71	RE-ENGINEER EDEExpress	Y
71.1	Conduct A & F Study with product registration	✓
71.2	Link application processing to FAA Access	✓
71.3	Implement Return to Title IV Web Release	Y
72	DEVELOP A LATE DISBURSEMENT APPROVAL AND TRACKING SYSTEM	cancelled
73	DEVELOP FSA SECURITY AND PRIVACY ARCHITECTURE PILOT	G
74	IMPLEMENT LEADERSHIP EXCELLENCE DEVELOPMENT TRAINING	Y

Key:



On Track



Progress Concerns



Not Reported



Management Intervention Required



Completed

Cancelled

The project will not be completed in FY 2004 due to a shift in FSA leadership priorities, and therefore, unappropriated resources.

Operations

Discretionary

FSA Project Status Report

FSA No	Area	Action Item				
			Status	Date	Comments	
						%Complete
						Status
1	ADS	Implement student aid awareness initiatives.				
		7/9/2004	Progress continues in each of the Milestones. Two of the milestones associated with this project (1.1 and 1.5) have been successfully completed. The remaining three (1.2, 1.3 and 1.4) are on schedule for completion prior to 9/30/04.			50%
		6/25/2004	Progress continues in each of the Milestones. Two of the milestones associated with this project (1.1 and 1.5) have been successfully completed. The remaining three (1.2, 1.3 and 1.4) are on schedule for completion prior to 9/30/04. Met with Pathways to College Network officials June 24th and June 25th to pursue partnering for the common goal. The Pathways to College Network is an alliance of 34 national organizations and funders focusing research-based knowledge and resources on improving college preparation, access, and success for underserved groups, including low-income students, underrepresented minorities, first-generation students, and students with disabilities. Through our collective efforts, the Network expects to change perceptions, practices, and policies about academic preparation and college opportunity; eliminate policy and programmatic barriers to college going; and make readiness for college success a fundamental goal of public education in the United States.			50%
2	ADS	Improve customer interaction through customer feedback particularly at the Customer Service Call Center (CSCC).				
		7/9/2004	Progress continues in all identified areas. Of particular note, at the end of June 2004, the IFAP Subscription Service membership reached 5,230 members, which is 111 additional subscribers since the previous month. This is a 26% increase since the beginning of FY 2004.			77%
		6/25/2004	Progress continues in all identified areas. Of particular note, CSCC added a Spanish script so that callers to the center now have the choice of hearing the greetings and options in Spanish.			73%
6	ADS	Administer Campus-Based (eCB) activities.				
		7/9/2004	FISAP testing has been completed, and corrections are now being incorporated into the eCB System. FISAP software will be issued to schools the week of 7/12/2004.			93%
		6/25/2004	FISAP testing continues and will be completed by 6/24/2004. We are on track to issue the new software to schools on 7/12/2004 or by the end of that week at the latest.			88%
8	ADS	Expand eZAudit initiative.				

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>		
		<i>Status Date</i>	<i>Comments</i>	<i>%Complete</i> <i>Status</i>
		7/9/2004	Market research began (companies were selected). Finalized SOW. Requested funding for the development of required reporting (17) for operational and OMB support. As of 7-04-04, 4,090 annual audit submissions have been rec'd. The large increase from the previous reporting period is due to the June 30 reporting deadline for those proprietary schools that have a FY end of 12-31 and over 700 submissions from the FY 02 reporting period.. 1,454 submissions have passed the QC screening. We will monitor this workload to assure timely processing. As of 7-05-04, 3,150 schools have registered, about 72% of all schools.	80% Yellow
		6/25/2004	Contract award is on track. Streamlined QC procedures have been developed and implemented. Metrics have been identified and are being gathered to address OMB requirements and DRCC oversight. School registrations are at 70% of domestic schools. We anticipate going to QC sampling and the project going to green within the next 45 days.	75% Yellow
9	ADS		<i>Enhance program monitoring and oversight.</i>	
		7/9/2004	9.1 -For the biweekly period 6-22-04 to 7-04-04, 95% of the audits were resolved on time. Cumulative since 10-01-03, 95% of the audits were resolved on time. We are continuing to monitor this closely. There are 20 audits on administrative stay. 9.2 - Case Team actions have reduced the number of schools and additional locations without the required NSLDS transfer student monitoring profiles by over 32%. 735 new profiles have been established reducing the number without required profiles down from 2,356 on 3/17/2004 to only 1,509 on 6/25/2004. Training is on track. The Administrative Actions & Appeals Division has received 62 referrals for administrative action and initiated 13 debarments from 10-01-03 through 7-06-04. 9.3 - HBCU Perkins Default project's analysis completed 9.4 - ASEDS received the first draft of the preliminary report on the results from the experiments during academic year 2002-03 9.5 - Phase I of the ISIR Analysis Tool became available to schools just prior to the expected June 30 release date 9.6 - The team leader continues to meet with subject matter experts in school eligibility, oversight, and systems processing. Work this reporting period focused on identifying existing and planned ASEDS internal controls for preventing improper payments to Title IV schools. Additional research and interviews with subject matter experts are planned for the next reporting period.	73% Green

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>			
		<i>Status</i>	<i>Date</i>	<i>Comments</i>	<i>%Complete</i> <i>Status</i>
		6/25/2004	Milestone 1	For the biweekly period 6-07-04 to 6-21-04, 88% of the audits were resolved on time. Cumulative since 10-01-03, 94% of the audits were resolved on time. We are continuing to monitor this closely.	68% Green
			Milestone 2	Case Team actions have reduced the number of schools and additional locations without the required NSLDS transfer student monitoring profiles by over 25%. 603 new profiles have been established reducing the number without required profiles down from 2,356 on 3/17/2004 to only 1,753 on 6/13/2004.	
				Training materials for the other compliance initiatives will be ready July 9, with training of trainers scheduled for July 27 -29.	
			Milestone 3: HBCu Perkins analysis began		
			Milestone 4: Group continues to analyze the data submitted by Experimental Sites Schools		
			Milestone 5: William Leith, Deputy Director of Application Processing, signed off on Phase I of the ISIR Analysis Tool, which will be available to schools by June 30		
			Milestone 6: The team leader continues to meet with subject matter experts in the area of school eligibility, oversight, and systems processing. The team leader has also researched the common data architecture deliverables on data quality, security, and privacy and is meeting with subject matter experts about identified vulnerabilities and mitigation strategies. Additional research, and interviews with subject matter experts are planned for the next reporting period.		
10	ADS		<i>Produce school publications and materials.</i>		
		7/9/2004	10.1 - Project remains on track.		74% Green
			10.2 -The Basics brochures continue to progress through the development phase. The Direct Loan PLUS Basics brochure will be presented to the Direct Loan Coalition on 7/12/2004 and then go to OPA for review. There are 52 back-ordered requests for publications or documents at the warehouse. All of these are for the Direct Loan PLUS Basics brochure that is currently being revised.		
		6/25/2004	Milestone 1: Volume 6 posted on IFAP put this milestone back on target turning the project level back to green.		72% Green
			Milestone 2: The Basics brochures continue to progress through the development phase. The Direct Loan PLUS Basics brochure is completing final FSA review and will go to OPA for review shortly. There are 42 back-ordered requests for publications or documents at the warehouse. All of these are for the Direct Loan PLUS Basics brochure that is currently being revised.		
11	ADS		<i>Develop and deliver program and technical training for schools through a combination of videoconferences, web-based training, and classroom experiences.</i>		

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>		
		<i>Status</i>	<i>Date</i>	<i>Comments</i>
				<i>%Complete</i>
				<i>Status</i>
			7/9/2004	--Award new training contract by April 2004.
				80%
				Yellow
				The Panel completed all its work and made its recommendations to the Contracting Officer on June 2. We are awaiting contract award.
			6/24/2004	--Award new training contract by April 2004.
				80%
				Green
				Awaiting contract award, which is now expected by July 1. Panel has completed all its work and on June 2, made its recommendations to the Contracting Officer.
				--Implement new registration system by March 2004.
				--On an ongoing basis, review and analyze participant/instructor evaluations of training sessions, attendance data, adherence to budgetary constraints, and production schedules to ensure optimal delivery of FSA training programs. Will report the outcome of these analysis periodically. Data for Electronic Application Processing training will be compiled after these sessions end in April."
				--Since the new registration system is live and running, no more reports on that will be given.
13	BS	<i>Enhance program monitoring and oversight.</i>		
			7/7/2004	Total non-consolidation recoveries reached \$1.247 Billion, an increase of 24 percent from the same period, thru June 30, in FY03. This represents 7.84 per cent of the FY04 portfolio balance.
				80%
				Green
				The Default Prevention Workgroup met and further refined the definitions of the strategies for default prevention. An earlier review of the default prevention inventory highlighted a significant gap in the efforts related to Perkins loans. ASED and the Portfolio Risk Management Group/Borrower Services are jointly conducting research to determine the scope of the defaults within the Perkins portfolio. The group will also work with schools and borrowers to reduce the number of defaults.
				The lifetime default rate measure will be calculated from two different points; from the date of origination and from the date the borrower enters repayment. Validation of the Direct Loan calculation for the lifetime default rate, from the time the borrower enters repayment, will be conducted initially. Subsequently the FFEL calculation will be completed.
				The goal to increase the cure rate on 181-360 day non-consolidated Direct Loans by 1 percent over FY2003 was achieved in April. The goal for FY2004 is 55.1 percent. The actual rate for June 2004 was 59.5 percent.
				The independent Verification and Validation (IV&V) team is continuing to review the functional requirements and test plan.

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>			
		<i>Status</i>	<i>Date</i>	<i>Comments</i>	<i>%Complete</i> <i>Status</i>
		6/25/2004	Total non-consolidation recoveries have now reached \$1.216 Billion, an increase of 25 percent from the same period, June 18th, in FY03.		72% Green
			The Default Management Workgroup meeting was held June 22. The goal for the meeting was to reach consensus and finalize the changes.		
			The Lifetime Default Rate analysis has on the 1994 through 1998 cohort for the Direct Consolidation Loan portfolio has been completed. The analysis on the FFELP portfolio for the same cohorts has begun. The Risk Management Team will be working with NSLDS staff to develop the SQL for extracting NSLDS data for this analysis.		
			The independent Verification and Validation (IV&V) team is continuing work on the project plan to align it with the new schedule. Once the plan is complete, Borrower Services staff will review it for final approval. This plan will be used for the assessment for the rest of 2004.		
14	BS	<i>Implement plan to provide high quality customer service to the Direct Loan portfolio.</i>			
		7/7/2004	Certification of the Spanish language Loan Consolidation Website is complete. The new site was launched on July 1, 2004.		80% Green
		6/25/2004	The CSB web team is continuing review of the comments from the May 27th demonstration. The development schedule for the site is on track and the completion date for Phase one, as scheduled, will be October 8, 2004. The Loan Consolidation web site will be integrated into the new CSB site at the completion of phase one. Once the new CSB site is launched, borrowers will have the ability to transfer between the Direct Loan Servicing site and the Loan Consolidation site without re-entering their personal identifiers.		75% Green
			Certification of the Spanish language Loan Consolidation Website is complete. The new site will be launched July 1, 2004.		
15	BS	<i>Implement plan to improve contractor oversight and performance related to Direct Loan Consolidation overpayments and underpayments.</i>			
		7/7/2004	The 20% reduction in overpayments and the 10% reduction in underpayments on consolidated loans were achieved for June. The target for overpayments for June was \$2,265,585; the actual dollar amount was \$1,133,227. The target for under payments for June was \$778,092; the actual dollar amount was \$209,543. Consolidation staff will work to maintain the 20% reduction in overpayments and the 10% reduction in underpayments each month thru September 30, 2004.		60% Green
		6/25/2004	The statistics for Loan Consolidation overpayments and underpayments are released monthly. The next report on this item will be issued mid-July.		60% Green
16	FPS	<i>Perform National Student Loan Data System (NSLDS) maintenance and operations activities.</i>			
		7/9/2004	NSLDS Maintenance and Operations Activities operating efficiently. June benchmarks were reviewed and distributed. Work has begun on GA and Lender Reasonability. The initial coordination meeting for the July cohort default rate calculation was held.		85% Green

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>			
		<i>Status</i>	<i>Date</i>	<i>Comments</i>	<i>%Complete</i> <i>Status</i>
		6/25/2004	NSLDS Maintenance and Operations Activities operating efficiently. May benchmarks were reviewed and distributed. The proposal for GA and Lender reasonability was accepted and is awaiting contract review board approval.	83%	Green
19	FPS	<i>Perform maintenance and operations activities for the Financial Partners Data Mart.</i>			
		7/9/2004	The PEPS deficiency code is being researched. The contractor migrated several SIR to production.	87%	Green
		6/25/2004	The contractor continues to made changes to the data mart. The FSA Data Mart team has tested several outstanding SIR.	83%	Green
20	FPS	<i>Perform Financial Partners Portal operations activities.</i>			
		7/9/2004	A revised LEAP/SLEAP page has been added to the Portal. New links will be added to the home page.	94%	Green
		6/25/2004	The contractor is researching the "Whats New" page limitation. The team continues to make updates.	92%	Green
21	FPS	<i>Perform Leveraging Educational Assistance Partnership/ Special Leveraging Educational Assistance Partnership (LEAP/SLEAP) activities.</i>			
		7/9/2004	All applications received were processed. Grant award notifications were scanned to PDF and forwarded electronically. There were five states and three territories that did not apply for 2004-2005 funding. New Mexico, one of the states, has been granted exception to the deadline due to turnover at the state and intends to apply.	100	Green
		6/25/2004	Applications from 48 of 56 potential entities have been received to date for the 2004-2005 LEAP/SLEAP award year; of those received, 36 have been processed and approved to date. The remaining applications shall be processed and grant awards will be made by the 7.1.2004 deadline. FP staff is still on track for meeting this deadline, barring any unforeseen technical difficulties with any of ED Network systems (i.e., GAPS).	90%	Green
22	FPS	<i>Perform Voluntary Flexible Agreement (VFA) activities.</i>			
		7/9/2004	The draft process document has been forwarded for comments. It is also being used to gauge the processing time associated with the NSLP/EAC VFA request. A draft of the benchmarking report will be forwarded for comments on Friday, 7.9.2004.	94%	Green
		6/25/2004	The costing model that is used to evaluate cost neutrality was reviewed with OMB on Monday, 6.14.2004 and FSA received concurrence on its use. Communication of the results with the VFA guarantors is in process and it is being incorporated into the development/reporting of VFA benchmarking measures. Due to a transition in staffing on the VFA team, the draft document for the VFA evaluation of new proposals was not forwarded the week of June 14th as expected. It will be forwarded for comment on Friday, 6.25.2004. In the meantime, the first steps of the draft process were executed for a new VFA proposal that was received by Financial Partner Services and the timeframes identified with the Colorado evaluation are being tested with the new proposal.	92%	Green
23	FPS	<i>Perform maintenance and improvements to the Financial Partners' Electronic Records Management (ERM) system in order to enhance use.</i>			
		7/9/2004	Completed.	100	Completed

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>			
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		6/25/2004		FP completed and submitted recommendations for improvements to the current ERM system in April 2004. Likewise, FP and SEC consolidated its recommendations into one spreadsheet "ERM System Enhancement Matrix". Based on the priorities within each Channel, the recommendations were prioritized according to staff needs, feasibility and dollar amount. Based on discussions with ERM (contractor), a Project Charter was created to address and provide timetables and completion dates for the "immediate tasks". This action item was successfully completed on Monday, 5.31.2004. As follow up, documentation was submitted to support the activities and closure of this action item.	100 Completed
25	FPS	<i>Enhance program monitoring and oversight.</i>			
		7/9/2004		? Ernst & Young (E&Y) is requesting three additional months of subrogated and receivable download data from the GAs and FSA. This data request covers time period of April through June 2004. FP will coordinate the E&Y request with all effected parties. ? A two-week review of the Rhode Island guaranty agency was concluded, in addition to a CRI review of Wells Fargo. A review of the Nebraska guaranty agency is underway. ? The use of the GA scorecard is being integrated into the FY05 planning and review of Guaranty Agencies. ? Work on the NSLDS vulnerability assessment task order began on Monday, 6.28.2004.	74% Green
		6/25/2004		? Ernst & Young (E&Y) has completed all five scheduled GA site visits. E&Y is now reviewing site visit results to determine if what official findings need to be reported. FP continues to assist E&Y. ? The South Carolina program review was concluded and the review of the Rhode Island guaranty agency was started. An updated Compilation of Lender and Servicer Review Findings and Observations Report was issued. ? The proposed meeting in Washington, DC for the Power User group and contractor support staff to conduct a team review of the Lender and GA scorecards was instead accomplished via conference calls. Team leads will prepare a supplemental section to aid with the validation of performance metrics. ? The contractor's NSLDS vulnerability assessment proposal was accepted by FSA. Continue to wait for award by Contracts Office.	70% Green
26	CFO	<i>Sustain clean audit opinion and address material weaknesses and reportable conditions identified in annual financial statement audits.</i>			
		7/9/2004		The financial statement audit is going into a new phase. Many Provided-By-Client (PBC) items will be needed during the month of July to support the June financial statements. This is a very heavy PBC month. CFO will be providing downloads, reconciliations, sample material, and scheduling conferences with the auditors to respond to questions. E&Y has also requested additional downloads from Guaranty Agencies for the June financial statement quarter.	50% Green
		6/24/2004		All Guaranty Agency site visits are complete and follow-up documentation is being collected. CFO office is preparing for a very large Provided by Client (PBC) demand in July.	40% Green
27	CFO	<i>Perform internal control reviews to enhance financial management.</i>			
		7/9/2004		No change is status. We are currently rating proposals.	20% Red
		6/24/2004		Panel has been established and review of proposals commenced on June 24,2004.	20% Red
28	CFO	<i>Finalize FY 2002 and FY 2003 cost accounting model and develop baseline FY 2002 unit costs.</i>			

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>		
		<i>Status</i>	<i>Date</i>	<i>Comments</i>
				<i>%Complete</i>
				<i>Status</i>
		7/9/2004	CFO continues to prepare the model for presentation to senior management and GAO during the week of July 12-16. We are on schedule to complete the final FY2003 model by July 31st.	40%
		6/24/2004	CFO has changed the approach to produce the FY2003 ABC model by the end of July and the FY2002 model by the end of September. The ABC team loaded the resource data into the model and has begun to re-set resource assignments and allocations. CFO will present initial findings to FSA management on July 1st, with a presentation to the Management Council scheduled on July 9th.	36%
29	CFO	Sustain and improve timely reconciliations and implement other procedures needed to comply with FY 2004 accelerated reporting requirements.		
		7/9/2004	Monthly Reconciliations: Reconciliations are being performed and completed on time (less than 20-days compared to 30-day metric).	40%
			Reconciliation Reengineering Project: Continual work with Contracts is in process to determine if existing Departmental BPA is an appropriate contracting vehicle and to re-solicit.	
			Desk Operating Procedures: All (total of eight) desk operating reconciliation procedures have been finalized.	
			Other: Began the next steps to implement the Production environment. We are currently using the Remote Control Explorer software (RCO) to send the files to the CheckFree staging server. We will begin using CITRIX software to do this in the near future. CITRIX is scheduled to be loaded at the VDC during the week of July 12th. This will allow us to access CheckFree at the VDC, without loading the CheckFree software on users desktops. Additionally, the production server has been ordered and should arrive at the VDC within the next month. There is a lot to be done prior to going to production both on the technical side and on the functional side as well. FSA/CIO is assisting with the technical aspects of the project. Determining the functional data requirements and methodology for future reconciliations, as well as a plan for rolling out the reconciliations.	

FSA No	Area	Action Item				
		Status	Date	Comments	%Complete Status	
			6/24/2004	Monthly Reconciliations: Reconciliations are being performed and completed on time (less than 20 days compared to 30-day metrix). Reconciliation Reengineering Project: Proposals received from vendors, as of 4-30-04, in response to FSA's request for additional clarification of approach level of effort estimate did not meet CFO requirements. To date, solicitation has been limited to financial consulting firms on the GSA schedule classified as "small". Such firms do not have the firm and staff qualifications required to fully meet the objectives of the reconciliation reengineering project based upon pre-solicitation market research performed by the Accounting Division (AD) and evaluation of proposals received in response to original and revised RFPs that were limited to firms classified as "small". The AD has confirmed requirements and approach and desires to open competition to include firms classified as "other". Financial Management Group/AD has decided to use a BPA to acquire the process reengineering services required. Work with Contracts has begun to determine if existing Department BPA is an appropriate contracting vehicle. Desk Operating Procedures: Six of the eight desk operating reconciliation procedures have been finalized. Received revised draft from Deva for one of the two remaining procedures and began review. Other: Production Environment - Decided on production environment architecture and initiated procurement process to obtain necessary hardware and technical contractor support. Pilot program reconciliations include (1) DLS to DCS transfers and (2) FMS/FMSS reconciliations. The status is as follows: 1) Completed testing of DLS to DCS transfers reconciliation and initiated process to maintain this reconciliation beginning June 1 in the staging environment until the production environment is available late July to mid-August; and 2) Initiated process to enable Deva to FTP FMS and FMSS sample data to the CheckFree staging server to begin the development of the CheckFree FMS to FMSS reconciliation. Next steps to implement the Production environment are (1) to assign and finalize support (i.e., application, database, system security officer) functions; and (2) develop functional and technical implementation plan.	38%	Yellow
30	CFO	Manage FMS operations.				
			7/9/2004	FMS Operations continues to operate smoothly.	74% Green	
			6/24/2004	FMS Operations continues to operate smoothly.	70% Green	
31	CIO	Develop and deploy Enterprise Performance Test Architecture.				
			7/9/2004	FAFSA GC Issue research is continuing. Several base line runs have been performed. Some root causes are beginning to be ruled out. EMPN testing is proceeding. Ombudsman, FP Portal and EMPN planning is proceeding. Planning for the process and technology libraries is proceeding.	21% Green	
			6/25/2004	Work is progressing on the 5 performance tests in progress. All testing activities are on schedule.	20% Green	
32	CIO	Provide Enterprise and Data Architecture management.				

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			7/9/2004	The EA team facilitated the Architecture Support Group discussing the mission, charter and responsibilities of the group. The group modified this information with the intent to create one CIO voice and perform "horizon scanning" tactics that will set standards and technological advancements on a proactive basis. The EA Team completed a draft FY06 A-11 Additional Instructions and Guidance Summary. Reviewed revised OMB Guidance with the ITIM/CPIC representatives and established a schedule for this year's Exhibit 300 process.	46% Green
			7/2/2004	The EA Team issued an alert this week to FSA CPIC - the latest OMB guidance requires a significant number of Exhibit 53/300's to change their Unique Project Identifiers. The EA Team submitted EA artifacts to OMB in support of the FY05 EA Self-Assessment. FSA will be required to submit FY06 (updated) EA Artifacts in September.	44% Green
			6/25/2004	The EA Team is archiving all documentation that currently makes up the Technology Handbook into Clearcase before restructuring the material into a Technology Library to be accessed from the EA Website and Tech Center drop-down on FSAnet. FSA / ED EA teams are meeting to discuss revisions to the ED EA documentation and synchronize our approach for meeting OMB's requirements for consolidated EA Business Case and EA documentation submission. FSA EA / DA Teams are meeting to discuss functionality to be added to Popkin based on its upcoming release of iRMA. EA continues to support the EPMS Team by providing guidance on the PRM / BRM alignment for each application in support of the Exhibit 300 submission.	42% Green
			6/18/2004	The EA Team submitted two additional questions to OMB related to a) properly aligning Education to the BRM in support of the Exhibit 300 submission and b) consolidating the ED and FSA EAs into one Exhibit 300. EA met with the ISLC team to discuss Data Management. ISLC will deliver a recommendation back to EA on whether Embarcadero or ERwin should be used for Data Management support at FSA. Also met with ISLC and Diana O'Hara discussing where the EA Governance fits into the ISLC Change Management process. Discussions will continue.	42% Green
33	CIO	<i>Provide security and privacy support to FSA business units.</i>			
			7/9/2004	Working with Systems to update Plans of Actions and Milestones. Reviewing proposals for contract support.	75% Green
			7/2/2004	Finalizing NIST Self Assessments for FISMA reporting. Working with systems to complete POA&M findings. Held meeting with BU SSOs to discuss next steps for C&A. Traveled to VDC to discuss vulnerability management.	75% Green
			6/25/2004	Continuing FISMA reporting work and validation activities associated with C&A activities.	80% Green
			6/18/2004	Working with systems to validate POA&M statuses for continued C&A work. Provided comments to ED/OCIO/IA that identified concerns for timeline and scope for continued C&A efforts. Working with systems to complete NIST Self-Assessments as part of our annual FISMA reporting. Assisting CSB with requirements for P3P implementation.	75% Green
34	CIO	<i>Provide Integrated Technical Architecture (ITA) and Enterprise Application Integration (EAI) maintenance and production support.</i>			

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		7/9/2004 ITA: Unfortunately last-minute technical issues prevented the completion of the Interwoven migration. We are on target for a 7/12 completion of the testing environment for eMPN in ITA. Student Aid on the Web and Schools Portal are being tested in their WAS 5.0 environments. Development and test environments have been completed for IFAP. ITA responded to 4 service requests this period. EAI: EAI is working closely with ITA on migrating eMPN to ITA. The transactional portion of the Message Status Inquiry Tool has been implemented in the development environment. EAI responded to 44 COD customer service requests.	41%	Green
		7/2/2004 ITA: The ITA team prepared for the Interwoven migration; all outstanding issues had been resolved moving into the weekend migration. Performance testing for FAFSA is underway; ITA is providing support throughout this initiative. All applications running under WAS 5.0 have been successfully moved to the CSS load balancer. WAS 3.5 applications will move to CSS as they are migrated to WAS 5.0 -- a project expected to be complete by the end of October. ITA responded to 6 service requests this period. EAI: EAI completed preparations for the eMPN peak. EAI has also begun work on a migration plan to upgrade to DataIntegrator version 7.0. EAI responded to 24 COD customer service requests. 6/18/2004 - ITA: The Interwoven migration has been delayed while two technical problems are being addressed. CSS implementation continues as scheduled. WAS migration projects continue according to plan. ITA is working with the Performance Testing team to performance test the FAFSA application. ITA is supporting eMPN during their migration into ITA. During the period, ITA responded to two ITA support tickets. EAI: EAI expects to upgrade to CommerceQuest v7 by the end of 2005. EAI will work with SAIG and COD to submit requirements to enable dynamic testing to be supported in the next release of edConnect. EAI responded to 31 COD customer service requests during the period.	41%	Green
		6/25/2004 ITA responded to two service requests and one production support request. It was determined that the production problem was not within ITA. EAI responded to 24 COD customer service inquiries. The team is making preparations for eMPN's migration into the ITA environment. Schools Portal, Financial Partners Portal, and Student Aid on the Web are undergoing application reviews to ensure "best practices" are used by the application teams. We expect to migrate these applications from WebSphere 3.5 to 5.0 by 8/1/04. The new target date for the Interwoven migration is the weekend of 6/25. All applications running under WAS 5.0 are now using CSS.	41%	Green
		6/18/2004 ITA: The Interwoven migration has been delayed while two technical problems are being addressed. CSS implementation continues as scheduled. WAS migration projects continue according to plan. ITA is working with the Performance Testing team to performance test the FAFSA application. ITA is supporting eMPN during their migration into ITA. During the period, ITA responded to two ITA support tickets.	41%	Green
36	CIO	<i>Continue Enterprise Quality Assurance Program to support the FSA CIO in conducting systems assessments and evaluations consistent with best practices for Solution Life Cycle (SLC) and Capital Planning and Investment Control (CPIC) processes.</i>		
		7/9/2004 Final FY04 transfer of funds document was reviewed by Deb Wrabley and sent to Glenn Perry's office and OGC for review, ahead of the FSA Budget Office's July 30 deadline. QA Team and Trey Wiesenburb are conducting meetings with the EAC / Spring Conference coordination team to provide technical support on conference requirements and the new procurement process. All QA Team IV&V, Security, and Operations support tasks are on track and on schedule.	77%	Green

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		7/2/2004	QA Team is scheduling an appointment with Deb Wrably to discuss final FY04 GSA/FEDSIM Transfer of Funds document. QA Team, Jim Coffman (Contracts), and Bob Padgett (GSA/FEDSIM) are exploring the possible use of PIR data, IV&V historic information, and current CSB IV&V findings as part of the ROI effort. QA PIR Team held a kick-off meeting with Debbie Bardain (FSA PMO), Susan Hall (Perot Systems), and QA team members on June 29 to update the PIR Process Description and supporting documents / templates. All QA Team IV&V, Security, and Operations support tasks are on track and on schedule.	75% Green
		6/25/2004	QA Team is preparing the final FY04 GSA/FEDSIM transfer of funds document for review by Contract Officer (Deb Wrabley) by June 25. The money will fund an optional performance period for COD Security Support and two additional months of ERM Operations Processing. All QA Team IV&V, Security, and Operations support tasks are on track and on schedule.	73% Green
		6/18/2004	QA Team accepted delivery of Post-Implementation Review (PIR) for Data Strategy, Release 1 investment. QA Team has also initiated a vendor re-compete for the PIR support task through GSA/FEDSIM, with selection anticipated by September 30, 2004. All QA Team IV&V, Security, and Operations support tasks are on track and on schedule.	71% Green
37	CIO	<i>Support ED, customers and business partners by participating in the President's Management Agenda E-Government initiatives.</i>		
		7/9/2004	On July 2, OMB and ED eLoans representatives met to discuss the eLoans Transition Strategy. Discussions centered around the proposal to bring the eLoans initiative to closure by (1) completing remaining work, (2) transitioning ownership to responsible partner agencies (e.g., GovLoans ownership transfers to DOL/GovBenefits), and (3) establishing a Public/Private Credit Council to oversee any remaining workstreams that require cross-agency input (including decisions on whether/how to proceed). Students.gov received an estimated 49,652 visits (1.2 million hits) during the week of June 27 - July 3, 2004. In June 2004, 243,397 visitors came to students.gov (5.8 million hits) - an increase of 13% from May. In June we added 265 new subscribers to students.gov InfoSource.	77% Green
		7/2/2004	Beginning on June 25, AOL's GovernmentGuide web portal featured GovLoans.gov on the GovernmentGuide home page. Jen Hanley, GovLoan's summer intern, has secured links to GovLoans.gov on 31 other web sites. On June 29-30, Human Factors International (HFI) conducted GovLoans.gov citizen usability testing at the Bureau of Labor Statistics Usability Lab and HFI's offices in Iowa. Students.gov received an estimated 60,345 visits (1.4 million hits) during the week of June 20-26, 2004. The July edition of InfoSource was sent to 15,118 subscribers on June 28th and included information on student loan repayment, the Student Right-to-Know and Family Educational Right to Privacy Acts, a career spotlight on the political science profession, and new sites recently added to students.gov.	75% Green
		6/25/2004	The GovLoans interagency working group met on June 23 to discuss GovLoans outreach, content, and the usability tests scheduled for June 29-30. Kath Straub from Human Factors International discussed her approach to conducting the usability tests. The Federal E-Authentication initiative issued a government-wide "data call" for information on systems that are considered "major" under the Federal Information Security Management Act (FISMA). FSA CIO staff have completed efforts to pre-fill requested information on FSA systems. A request to validate and to complete the FSA data call was issued to system owners and system security officers this week. Students.gov received an estimated 59,702 visits during the week of June 13-19, 2004. Mark Seaman, Summer Intern for Students.gov, distributed a survey to all 35 of the FSA summer interns last week to get feedback about students.gov's content and usability. He will analyze the responses and we will use the results to improve Students.gov's usefulness to students.	73% Green

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		6/18/2004		On June 15, the eLoans partner agencies met to discuss workgroup progress and next steps for moving forward. GovLoans.gov outreach has secured a link on FirstGov and has begun requesting links from other government and non-government web sites. As of June 14th, 15,033 people are subscribed to Students.gov 'InfoSource', a subscription service that highlights the features of students.gov.	71% Green
		6/18/2004		On June 15, the eLoans partner agencies met to discuss workgroup progress and next steps for moving forward. GovLoans.gov outreach has secured a link on FirstGov and has begun requesting links from other government and non-government web sites. As of June 14th, 15,033 people are subscribed to Students.gov 'InfoSource', a subscription service that highlights the features of students.gov.	71% Green
38	OMBD	<i>Provide high quality information, research and informal problem resolution services to student loan borrowers and other participants in student aid programs.</i>			
		7/9/2004		Weekly surveys of customer satisfaction with research and general assistance cases scor 1.9 or less on a scale of 1-5 with 1 being HIGHEST. Ombudsman Office Overall service rating 1.67 (through 7/2/04)	75% Green
		6/25/2004		Weekly surveys of customer satisfaction with research and general assistance cases score 1.9 or less on a scale of 1-5 with 1 being HIGHEST. Ombudsman Office Overall service rating 1.66 (through 06/18/04)	75% Green
41	CMS	<i>Plan and manage FSA conferences.</i>			
		7/9/2004		-Once conference data documentation is submitted, this project will be complete.	99% Green
		6/25/2004		-Two staffers are in New Orleans at the National Educational Computing Conference to oversee the set up of ED's booth and represent FSA with awareness as the main focus. -Work continues on development of new procedures for EAC session reviews.	97% Green
		6/25/2004		Performance measure is completed. Time is needed to gather information that supports this performance measure	99% Green
42	CMS	<i>Manage, develop and update content for FSANet.</i>			
		7/9/2004		-FSANet Assist was "soft" launched. It will be announced to employees on Monday, July 12.	75% Green
		6/25/2004		-FSANet passed the IPC for funding for FY2005. -FSANet will launch FSA Assist on Monday, June 28. FSA Assist replaces the Rumor Mill. -Unable to get FSANet statistics due to server-related issues.	65% Green
43	CMS	<i>Manage controlled correspondence functions including FOIA, privacy and controlled mail.</i>			
		7/9/2004		Controlled Correspondence - 198 letters were handled by FSA and all were on time. FOIA cases - There were four new cases and seven cases have been closed.	75% Green

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		6/25/2004	<p>The top 5 main requests via controlled mail were: Complaint regarding defaulted loans; request for financial assistance; request for cancellation of student loans; inquiring on the status of consolidation application/conditional disability discharge application; and, interest rates too high on student loans and they since consolidated and the can't get a lower rate without a new loan.</p> <p>-There were 210 pieces of controlled mail answered. All are on time.</p> <p>FOIA cases - There were nine new cases and three closed cases.</p>	65% Green
44	CMS	<i>Develop and implement internal and external communications strategy.</i>		
		7/9/2004	<p>-Article from Orlando Sentinel on consolidation was included in newsclips.</p> <p>-Terri Shaw has an interview with Govt. Computer News today.</p> <p>-Daily newsclips on time.</p> <p>-FSA Weekly News to employees on time.</p> <p>-Hot Issues List to Sec. Paige on time.</p> <p>-Weekly Report to Sec. Paige on time.</p> <p>**-Lobby Monitor crashed. CIO, ED & contractors are investigating what is broke. Lobby monitor will be taken down and replaced with a screen from the training center until it is fixed or replaced. This problem is still being evaluated.</p> <p>-Information Requests - To date, 295 requests have been received and 13 remain open and one on hold. The last three requests were: Cong. Mark Foley's office wants a meeting with ED and MedVance Institute concerning the eligibility; Ann Clough is requesting LEAP/SLEAP data; Sallie Mae is asking for loan volume data.</p>	75% Green
		6/25/2004	<p>-Interview held with FSA's Bob Kling and the Orlando Sentinel on consolidation loans. Article forthcoming.</p> <p>-Hot media issues are Corinthian College and Career Education Corp.</p> <p>-Daily newsclips on time.</p> <p>-FSA Weekly News to employees on time.</p> <p>-Hot issues list to Sec. Paige on time.</p> <p>-Weekly Report to Sec. Paige on time.</p> <p>-Comms director visited Dallas and Denver regional offices with Terri Shaw.</p> <p>-Lobby monitor updated with current dashboard as of 6/24/04.</p> <p>-Information requests - To date, there have been 284 requests with 27 open and 1 on hold. The most recent requests are: Career Education Corp and the program review; Interview on consolidation and interest rates; Questions about how FSA audits schools, frequency, etc.</p>	65% Green
45	EPMS	<i>Mature Enterprise-wide Procurement Plan.</i>		
		6/30/2004	Project Completed.	100 Completed

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		<i>Status Date</i>	<i>Comments</i>	<i>%Complete</i>	<i>Status</i>
		6/25/2004	The annual update of the Enterprise Procurement Plan was completed on 6/14/04. The EWPPDb is currently in limbo until it is determined whether the TRB process applies. Harry Feely has determined that it does not; waiting for ED concurrence. Save this requirement, all requirements to complete the plan are complete. Percent complete is advanced due to the completion of the the Enterprise-wide Procurement Plan under 45.2.	75%	Yellow
46	EPMS	<i>Develop acquisition workforce.</i>			
		7/9/2004	The workforce continues to attend training as forecasted in the annual training plan. A training assessment and evaluation process is scheduled for completion before the next reporting period. This will provide an overall evaluation of accomplishments so progress can be accurately reported. Otherwise there has been no change since the last two reporting periods.	60%	Green
		6/25/2004	No change from last report.	60%	Green
47	EPMS	<i>Implement enterprise contract performance monitoring measures against new systems contract awards.</i>			
		7/9/2004	FEBI incorporation into the process is still dependent on the FEBI acquisition schedule. No change from last reporting period.	90%	Green
		6/29/2004	The FEBI initiative has delayed the completion of this project until September 04 or beyond.	70%	Yellow
		6/25/2004	FEBI incorporation into the process is still dependent on the FEBI acquisition schedule. No change from last reporting period.	70%	Yellow
48	EPMS	<i>Continuously update and monitor procurement internal controls.</i>			
		7/9/2004	While internal controls are in place establishing a baseline to assess success measures has proven difficult as FSA specific data is not easily severable from Department data. FSA has eliminated four (4) large sole source contracts to date this FY and anticipates only one extension. This result compares favorably with FY 03 in which 3 extensions were made. The existing reporting methodologies are currently being evaluated and techniques are being developed for acquiring the required data. Acquisition process measurements are underway with the establishment of timelines for various type of procurement. Refinement of those templates will be an on-going exercise. Initial contract performance measures are complete.	90%	Green

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>			
		<i>Status</i>	<i>Date</i>	<i>Comments</i>	<i>%Complete</i> <i>Status</i>
		6/25/2004		While internal controls are in place establishing a baseline to assess success measures has proven difficult as FSA specific data is not easily severable from Department data. FSA has eliminated four (4) large sole source contracts to date this FY and anticipates only one extension. This result compares favorably with FY 03 in which 3 extensions were made. The existing reporting methodologies are currently being evaluated and techniques are being developed for acquiring the required data.	75% Yellow
				Acquisition process measurements are underway with the establishment of timelines for various type of procurement. Refinement of those templates will be an on-going exercise.	
				Initial contract performance measures are complete.	
49	EPMS			<i>Increase contract dollars awarded to small businesses.</i>	
		7/9/2004		Exceed FY 04 goals but still monitoring awards until the end of the FY. This task will carry over into the next FY as we continue to monitor contract dollars awarded to small businesses.	95% Green
		6/25/2004		No change from last reporting period.	95% Green
50	EPMS			<i>Continue to implement integrated project management oversight for FSA's system integration activities.</i>	
		6/25/2004		Continue to add FSA initiatives/projects into PMO oversight. Focus most recently has been on quality of reporting into PMO by current initiatives.	60% Green
51	EPMS			<i>Evaluate and implement selected project management standards based on the system development methodology (Solution Life Cycle).</i>	
		6/25/2004		No updates to report since last reporting period.	08% Red
52	EPMS			<i>Restructure integration leadership support to transition the majority of responsibility to FSA staff.</i>	
		6/25/2004		Integration activities with new partner continue and draft integraton plan was received during this reporting period. However, percent complete remains unchanged as designated FSA staff have still not been named to the integration group.	70% Green
53	EPMS			<i>Prepare and continually monitor and report on the accomplishments of the High Risk Plan.</i>	

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>				
			<i>Status Date</i>	<i>Comments</i>	<i>%Complete</i>	<i>Status</i>
				system to track staff development. The last issue, as well as the ASEDs reorganization status, was discussed at the exit meeting. GAO also noted the need to link senior officials' performance agreements to organizational goals and suggested the basis for awarding bonuses to such officials be included in their performance agreements. The statement in GAO's point sheet about 6 of 11 senior officials' 2003 performance agreements not being linked to FSA's goals was resolved just prior to the meeting by redefining which senior officials were on the Management Council during what part of 2003.		
54	AWSS	Deliver workforce development and support programs.				
			7/9/2004	None.	90%	Yellow
			7/9/2004	No information provided.	90%	Yellow
			6/25/2004	We are changing to yellow based on conditions beyond our control related to Milestones 4. Skills Catalog and Learning Tracks, 5. Implementation of One ED, and 6. Workforce Alignment, as outlined below. Otherwise, progress is being made in the remainder of the milestones related to this objective.	90%	Yellow
55	AWSS	Perform facilities management activities.				
			6/21/2004	Completed after bi-weekly report submitted on 06/10/04.	100	Completed
56	CFO	Review Credit Reform estimates.				
			7/9/2004	The subgroups of the Credit Reform Work Group (CRWG) have continued to make progress. Budget Service provided CFO representatives a walk-through of the effects of the credit reform estimates on the appropriate general ledger accounts. The outside agencies subgroup distributed a discussion draft of observations and recommendations for improvement. Subteam representatives identified certain information and analyses that should be developed in order to better understand the estimates. The CRWG principals met on June 24 to review progress and status, and discuss next steps. Budget Service provided OCFO and FSA/CFO with the FY04 credit reform estimation journal entries to post to the June 30 financial statements.	40%	Green
			6/24/2004	The Credit Reform Work Group (CRWG) subgroups have continued to make progress. On June 21 and 23 Budget Service presented to business owners an overview of the change in subsidy expense in FY04 vs FY03 due to changed assumptions. The outside agencies subgroup completed a discussion draft of observations and recommendations for improvement. The CRWG principals meet on June 24 to review progress and status, and discuss next steps.	33%	Green
58	CFO	Support the implementation of Oracle Federal Financials Release 11i.				

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>			
		<i>Status</i>	<i>Date</i>	<i>Comments</i>	<i>%Complete</i> <i>Status</i>
			7/9/2004	The FSA Oracle 11i support contractor continues to provide significant input into the Oracle 11i functional sub-teams, in the form of meeting participation, white papers, and continued requirements gathering work with FMS users.	69% Green
				The FSA team has provided feedback on the IV&V contractor's project management plan and on the ACCS/Multi-Org CRP Setup document.	
				The FSA team has initiated the requirements coordination activities, where a contractor staff will be responsible for communicating 11i requirements to other FSA initiatives, collecting other FSA initiative requirements, and coordinating implementation schedules.	
			6/24/2004	The FSA Oracle 11i support contractor delivered draft white papers to FSA 11i team members for the following topics: FSA payment processing, FSA-related regulations impacting Oracle 11i upgrade, FFEL-GA and LaRS extensions, audit trail and reconciliations, and technical architecture.	64% Green
				The FSA team has provided feedback on the project management office contractor's performance measurement plan deliverable.	
59	CFO	<i>Implement automated budget funding entry solution.</i>			
			7/9/2004	Having completed the technical designs, the FMS and EDCAPS contractors are currently developing the code. Regular meetings continue, ensuring that the EDCAPS contractor, FMS contractor, OCFO and FSA CFO all develop code and test in unison.	55% Green
			6/24/2004	The FMS contractor delivered the final Technical Design document and functional test scripts. The EDCAPS contractor is complete with the draft technical design document. Regular meetings have been occurring, ensuring that the EDCAPS contractor, FMS contractor, OCFO, and FSA CFO all agree to the requirements and initial design specifications.	50% Green
62	BS	<i>Begin the implementation of Common Services for Borrowers (CSB).</i>			
			7/6/2004	The success measure for item 62.2 of the annual plan is to begin migration of the legacy Loan Consolidation system into the CSB by July 2004. The CSB transition team has begun the process for migrating the LC systems into the CSB solution and development activities are underway. However, slippage has occurred -- therefore the status has been temporarily changed to yellow. The data base conversion is being tested simultaneous with the development, with initial positive results. The anticipated completion date for the consolidation move is October 2004.	75% Yellow
			6/25/2004	This item is reported under the Milestones, Item # 62.2.	60% Green
63	ADS	<i>Improve school partner oversight.</i>			
			7/9/2004	At this time, we are requesting title and scope changes for milestone 63.1, title and scope changes for milestone 63.6, and cancellation of milestone 63.8. See the milestones for details.	77% Green
				In conjunction with the these milestone changes, we also need to request a date change for the project. With the cancellation of milestone 63.8, the target completion date for the project would be 8/30/2004.	

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>			
		<i>Status</i>	<i>Date</i>	<i>Comments</i>	<i>%Complete</i> <i>Status</i>
			6/25/2004	See milestones 63.1, 63.6, and 63.8 for progress updates.	73% Green
67	ADS	<i>Prepare to implement IRS data match.</i>			
			7/9/2004	The IRS Workgroup has finalized a presentation for the Management Council that summarizes the work that the group has done to date and provides an overview of five possible IRS match scenarios. The Workgroup is scheduled to make its presentation to the Council on 8/3/04.	78% Green
				The Workgroup continues to meet to develop a high level plan for conducting an IRS demonstration pilot in the first year(s) of implementation.	
				In addition, the Workgroup is presenting two IRS Match sessions at the NASFAA Conference in Minneapolis in July 2004.	
			6/25/2004	The IRS Workgroup has finalized a presentation for the Management Council that summarizes the work that the group has done to date and provides an overview of five possible IRS match scenarios. They had planned to give the presentation to the Management Council on Thursday, 6/10/04, but the meeting was rescheduled for 6/22/04. The 6/22/04 meeting also needed to be rescheduled. The Workgroup is now scheduled for 8/3/04 to make the presentation.	78% Green
				The Workgroup continues to meet to develop a high level plan for conducting an IRS demonstration pilot in the first year(s) of implementation.	
				In addition, the Workgroup is developing an IRS Match presentation for the NASFAA Conference in Minneapolis in July 2004.	
68	AWSS	<i>Continue Learning Coupon program.</i>			
			6/25/2004	We are at 43% of our goal. This is in line with historical usage patterns. The majority of coupons are submitted in July and August. Online database is ready to launch.	30% Yellow
69	AWSS	<i>Provide Career Zone services.</i>			
			7/9/2004	The Career Zone introduced a new Guest Speaker Series in June with a presentation by Max Larsen from the Gallup Organization. He discussed the Strength Finder assessment from the book titled, "Now Discover Your Strengths. The presentation was attended by 25 FSA staff and received very positive feedback. The Career Zone is preparing for its regional visits to New York and Philadelphia scheduled for July 28th and 29th. The purpose of these visit(s) is to provide regional staff with access to Career Management and Developmental Services.	75% Green

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>		
		<i>Status Date</i>	<i>Comments</i>	<i>%Complete</i> <i>Status</i>
		6/25/2004	<p>The Career Zone is currently offering a 4 week Conversational Spanish class to help staff develop skills to communicate and understand Spanish as it relates to your professional work in FSA. Classes started June 14 and will run through August 6th.</p> <p>Career Zone evaluations remained consistent through the month of May with an overall score of 4.60 on a 5 point scale. Career Management Workshop (Resume/KSA, Interviewing) received the highest rating of 4.85. The Career Zone has provided learning and development services to over 500 FSA employees in FY04 (Oct 2003-May 2004). This surpasses the prior fiscal year (FY03) by over 200 participants. The Career Counselors have engaged 45 new career counseling clients since their arrival in January 2004. Staff evaluations for Career Counseling services received an overall score of 4.75.</p>	75% Green
70	ADS	<i>Increase Student Financial Aid program awareness.</i>		
		7/9/2004	The two Milestones associated with this project (70.1 & 70.2) are now rolled into the Front End Business Integration (FEBI) Small Business Initiative. This initiative will result in a contract award for a marketing and outreach provider by 9/30/04. Market research is complete. The Contracts Review Board has approved draft SOO and invitation to offerers. Request for capability statement posted on GSA Advantage June 17th. Capability statements were received June 30th and have been reviewed and evaluated. On track with project calendar.	50% Green
		6/25/2004	The two Milestones associated with this project (70.1 & 70.2) are now rolled into the Front End Business Integration (FEBI) Small Business Initiative. This initiative will result in a contract award for a marketing and outreach provider by 9/30/04. Market research is complete. The Contracts Review Board has approved draft SOO and invitation to offerers. Request for capability statement posted on GSA Advantage June 17th. Capability statements due June 30th. On track with project calendar.	55% Green
71	ADS	<i>Reengineer EDEExpress.</i>		
		7/9/2004	<p>The contractor has delivered a schedule for the new release of Return to Title IV Funds on the web software. The PRR is tentatively planned for early September.</p> <p>The System of Records Notice (SORN) is awaiting sign off by management at FSA and then will be posted to the Federal Register for a thirty-day comment period. The anticipated completion of the clearance process is by late August.</p> <p>This product is non-year specific and delaying the posting will not impact schools adversely. There is currently a PC product that is available. However, we would like to post the product before the 04-05 academic year begins in the fall of 2004.</p>	95% Yellow
		6/25/2004	The contractor has delivered a schedule for the new release of Return to Title IV Funds on the web software. The new anticipated release date is September 12, 2004. Therefore, we requested a revision to the schedule for completion by September 30, 2004. Completion of the System of Records Notice (SORN) continues through the clearance process with an anticipated completion in late August. This product is non-year specific and delaying the posting will not impact schools adversely. There is currently a PC product that is available. However, we would like to post the product before the 04-05 academic year begins in the fall of 2004.	95% Green

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>			
		<i>Status</i>	<i>Date</i>	<i>Comments</i>	<i>%Complete</i> <i>Status</i>
72	PL	<i>Develop a Late Disbursement Approval and Tracking system.</i>			
		6/18/2004		With the approval of the IPC on Wednesday, June 16, 2004, this project is cancelled for FY 2004. It has been determined that automating this process is not cost effective. In addition, this process is being successfully being performed manually.	00% Cancelled
73	CIO	<i>Develop FSA Security and Privacy Architecture Pilot.</i>			
		7/9/2004		Meeting with IPM and other business owners to clearly identify touchpoints with the security architecture. Revised the draft SOO based on feedback from BTIG.	48% Green
		7/2/2004		Draft Soo was presented to the BTIG for feedback and guidance. Enterprise wide touch points were identified with IPM and discussions are under way to resolve the commonality between IPM and security architecture and come up with a plan to identify and resolve the dependencies and touchpoints.	48% Green
		6/25/2004		A draft SOO for the conceptual design of the security architecture has been presented to the ILSC partner. Currently we are working on restricting the scope of work so that the conceptual architecture can be completed within the allocated budget and the timeframe.	48% Green
		6/18/2004		The security architecture business case was presented and approved by IPC for FY05 funding. The conceptual design SOO is under progress. We are also under discussion with the ILSC partner for potentially performing the conceptual design.	48% Green
74	AWSS	<i>Implement Leadership Excellence development training.</i>			
		7/9/2004		No activity to report.	66% Yellow
		6/25/2004		Of 3 items to be accomplished, 2 have been completed but since the Management Council has not determined what approach they want to take on a 360 assessment, we have not met that target (as of this date.) No new activity to report.	66% Yellow

FSA Milestone Status Report

FSA No	Area	Action Item		Status Date	Comments	%Complete	Status
		Milestone#	Action Item				
1	ADS	Implement student aid awareness initiatives.					
		1.1	Leverage partnership activities to disseminate FSA information.				
			7/9/2004	SAA participated in 2 continuing partnership activities - June 26 – 28 exhibited materials at the annual PTA convention in Anaheim, CA. June 29 – July 5 disseminated information at the National Federation of the Blind conference in Atlanta, GA. Three new outreach activities – June 23 – presentation in Washington, DC to high school students attending the National Native American Youth Initiative about the federal student aid application process. June 25 –29 exhibited materials at the American Library Association convention held in Orlando, FL. and June 27 – 30 at the American Counselors Association convention in Reno, NV.		100%	Complete
			6/25/2004	SAA participated in 2 continuing partnership activities - June 15 – Demonstrated Student Aid on the Web for staff of the National College Access Network. June 21 SAA participated in the HUD Neighborhood Network Week kickoff celebration at Paradise at Parkside multi-family housing complex in northeast Washington, DC. Question about federal student aid were answered and information was distributed to housing residents. This was one of 150 celebration events being held nationwide June 21 – 25.		100%	Complete
				New activity – SAA partnered with the Secretary’s office to distribute financial aid and No Child Left Behind materials at the African-American Heritage Festival in Baltimore, MD on June 18 – 20.			
		1.2	Publish accurate and timely information that meets the needs of our audience.				
			7/9/2004	Meeting was held with GPO last week to discuss design work for The Student Guide. Text of Guide is being revised.		17 %	Green
			6/25/2004	Completed paperwork to open the GPO jacket for design purposes. Meeting with GPO the week of June 28th to discuss The Student Guide. Received feedback from summer interns on the Guide and will incorporate their suggestions. Review of draft HEA reauthorization has begun.		16 %	Green
		1.3	Disseminate information directly to target audience.				
			7/9/2004	Student Aid Awareness (SAA) disseminates information directly to target audiences through partnerships, training, college fairs, financial aid nights and other activities. As of 7/9/04, SAA has provided federal student aid information and distributed materials to approximately 77,179 persons as follows:June 23, 2004 National Native American Youth Initiative 60 June 26-29, 2004 American Library Association 700June 27-30, 2004 American School Counselor Association 300 During FY03, SAA distributed materials to approximately 103,400. Our Outreach plans for the summer and early fall should position SAA to meet our goal. In addition to our direct dissemination activities, we also reach our targeted populations via partners/intermediaries. See goal 1.1.		73 %	Green

6/25/2004 Student Aid Awareness (SAA) disseminates information directly to target audiences through partnerships, training, college fairs, financial aid nights and other activities. As of 6/23/04, SAA has provided federal student aid information and distributed materials to approximately 76,119 persons. The following number of persons received information during this reporting period: June 15, 2004 NCAN Webnair 10Jun3 18-20, 2004 African American Heritage Festival 1500 June 21, 2004 US HUD Neighborhood Networks 400 During FY03, SAA distributed materials to approximately 103,400. Our Outreach plans for the summer and early fall should position SAA to meet our goal. In addition to our direct dissemination activities, we also reach our targeted populations via partners/intermediaries. See goal 1.1.

1.4 Respond accurately and timely to requests.

7/9/2004 For the period 6/21/04 –7/2/04, the Editorial Services Contract responded to the following correspondence: 72 controls--- (67 prior period)-----turnaround (3 days)=100% 1226 non-controls--- (1155 prior period) —turnaround (2 days)=100% 2200 e-mails--- (1866 prior period)-----turnaround (2 days)=100% 99 % Green

6/25/2004 For the period 6/4/04 –6/18/04, the Editorial Services Contract responded to the following correspondence: 67 controls--- (78 prior period)-----turnaround (3 days)=100% 1155 non-controls--- (1301 prior period) —turnaround (2 days)=100% 1866 e-mails--- (1982 prior period)-----turnaround (2 days)=100% 99 % Green

1.5 Reach customers through Student Aid on the Web.

7/9/2004 Student Aid Awareness uses the WebTrends program to record the use of our website Student Aid on the Web (SAOTW). The number of visits and hits are the key indicators of the use of SAOTW. The number of visits and hits for this reporting period (06-20- to 07-03-04) are 780,275 and 14,626,078 respectively. During the same period last fiscal year we had 547,574 visits and 8,347,597 hits. This represents FY04 increases of 42.5% for visits and 75.2% for hits over FY03. MyFSA, the Student Aid on the Web feature that allows students and parents to establish their own personal password protected accounts for use as they move through the financial aid life cycle has recorded 39,168 new accounts since SAOTW went live September 7, 2003. Information entered in their personal profiles can be saved and used to electronically pre-populate much of the FAFSA application and make application for admission to college. The MyFSA feature has only been available since September of 2003. 100% Complete

6/25/2004 Student Aid Awareness uses the WebTrends program to record the use of our website Student Aid on the Web (SAOTW). The number of visits and hits are the key indicators of the use of SAOTW. The number of visits and hits for this reporting period (06-06- to 06-19-04) are 720,902 and 12,582,315 respectively. During the same period last fiscal year we had 532,443 visits and 8,182,753 hits. This represents FY04 increases of 35.4% for visits and 53.8% for hits over FY03. MyFSA, the Student Aid on the Web feature that allows students and parents to establish their own personal password protected accounts for use as they move through the financial aid life cycle has recorded 36,388 new accounts since SAOTW went live September 7, 2003. Information entered in their personal profiles can be saved and used to electronically pre-populate much of the FAFSA application and make application for admission to college. The MyFSA feature has only been available since September of 2003. 100% Complete

2 ADS Improve customer interaction through customer feedback particularly at the Customer Service Call Center (CSCC).

2.1 Monitor customer feedback to improve services.

7/9/2004	Progress continues as follows:	77 %	Green
	Web Search Replacement - Indus continues to support OCIO during their replacement of Autonomy Search Engine with a Google search engine.		
	EZ Audit - Meetings continue between EZ Audit and CSCC staff. The previous June 30th deadline did cause CSCC's phone volume to increase over the past 3 weeks; however, it returned to normal after the deadline. Our next peak is expected in December 2004. We have, however, come up with some additional ideas that may make the process easier in the future. We are beginning to investigate such changes.		
	Customer Feedback - Bill Zahn of University of NC-Greensboro had a situation where a student submitted her Renewal application which was processed in February. The email notification that she received indicated that her form had been processed and that if she wished to view the results, she could go to a designated URL. It did not, however, indicate that she MUST review the data as there MAY be some inconsistencies or problems which would have to be resolved prior to her receiving any financial aid. She did not follow up and was unaware that her application was actually rejected until her deadline (in May) for submitting a valid ISIR had passed. Mr. Zahn suggested that the email notification be improved to encourage students to look at their application results as further action on their part may be necessary in order to receive aid. This suggestion was forwarded to the Application Processing Division staff for consideration for the 2005-06 processing cycle.		
	IFAP Subscription Service - At the end of June 2004, our membership reached 5,230 members, which is 111 additional subscribers since the previous month. This is a 26% increase since the beginning of FY 2004.		
6/25/2004	Progress continues as follows:	73 %	Green
	Replacement of Autonomy Search Engine -- OCIO is currently in the middle of building a Google production infrastructure at this time. They are waiting for the delivery of a Google appliance and firewall equipment that will take about 3-4 weeks. Indus (the Schools Portal and IFAP maintenance contractor) may be able to work on Google conversion project in August 2004.		
	EZ Audit -- CSCC staff continue to handle EZ Audit password resets. Status meetings are scheduled every other week. We have noticed an increase in our call volume, especially as we approach a June 30, 2004 EZ Audit deadline.		
	Spanish Greetings -- In order to improve our service to our Spanish speaking customers, we have added a script in Spanish so that when callers contact our center, they now have the choice of hearing our greetings and options in Spanish.		
	Customer Feedback -- Richard Brand of Maryville College submitted an inquiry to CSCC which questioned how the CPS handles transactions when a student changes his/her marital status after the student has initially applied. He suggested that we should reject the transaction. That suggestion was forwarded to the Application Development Team. The team indicated that they would consider the change in the 2006-07 processing cycle (since the 2005-06 requirements phase has already closed).		
	Mr. Phil Gordan, Financial Aid Professional at Highland Community College, called us with a concern regarding the final paragraph on page AVG-103 of the Application & Verification Guide [2004-2005]. It seems to suggest that one can adjust an applicant's EFC. He provided a suggested change. The change was submitted to the Research & Publications staff who will hold the suggestion for inclusion in next year's FSA Handbook. R&P staff agreed with the change.		

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>			
			<i>Milestone#</i>	<i>Action Item</i>	
			<i>Status Date</i>	<i>Comments</i>	<i>%Complete Status</i>
			7/9/2004	FISAP testing has been completed, and corrections are now being incorporated into the eCB System. FISAP software will be issued to schools the week of 7/12/2004.	93 % Green
			6/25/2004	FISAP testing continues and will be completed by 6/24/2004. We are on track to issue the new software to schools on 7/12/2004 or by the end of that week at the latest.	88 % Green
8	ADS	Expand eZAudit initiative.			
		8.1	Be Prepared for Contract Award.		
			7/9/2004	Market research began (companies were selected). Finalized SOW. Requested funding for the development of required reporting (17) for operational and OMB support.	72 % Green
			6/25/2004	The statement of objectives is in its final review. Target completion is end of June. Market research will be kicked off first week in July. Current contract has been extended 2 months through Nov. The target for award of the new contract is on track for Oct 1.	70 % Green
		8.2	Complete first full cycle of processing (all school types).		
			7/9/2004	As of 7-04-04, 4,090 annual audit submissions have been rec'd. The large increase from the previous reporting period is due to the June 30 reporting deadline for those proprietary schools that have a FY end of 12-31 and over 700 submissions from the FY 02 reporting period. 1,454 submissions have passed the QC screening. We will monitor this workload to assure timely processing.	75 % Yellow
			6/25/2004	Change completion date to 9-30-04. Since this is a processing system, we will continue to process throughout the year. We are continuing to process school submissions on a daily basis. We streamlined the QC process on 6-21 by having the Case Teams review the QC completed by the DRCC. Case Teams will note any discrepancies and report those to the Ezaudit Team. As of 6-21-04, 1,933 annual audit submissions have been rec'd, of which 1,240 have passed the QC screening. Metrics gathering is in process to evaluate the quality of the school input and the DRCC review of the school data.	55 % Yellow
		8.3	Improve audit review component of our compliance activities by increasing the e-submission rate to 95%.		
			7/9/2004	As of 7-05-04, 3,150 schools have registered, about 72% of all schools.	72 % Green
			6/25/2004	As of 6-21-04, 3,035 schools have registered, about 70% of all schools.	70 % Green
9	ADS	Enhance program monitoring and oversight.			

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>			
		<i>Milestone#</i>	<i>Action Item</i>		
		<i>Status</i>	<i>Date</i>	<i>Comments</i>	<i>%Complete</i> <i>Status</i>
9.1		Meet or exceed audit resolution rate of 95% by the end of the fiscal year.			
		7/9/2004		For the biweekly period 6-22-04 to 7-04-04, 95% of the audits were resolved on time. Cumulative since 10-01-03, 95% of the audits were resolved on time. We are continuing to monitor this closely. There are 20 audits on administrative stay.	70 % Green
		6/25/2004		For the biweekly period 6-07-04 to 6-21-04, 88% of the audits were resolved on time. Cumulative since 10-01-03, 94% of the audits were resolved on time. We are continuing to monitor this closely. There are 20 audits on administrative stay.	68 % Green
9.2		Continue to measure school monitoring to assess overall compliance trends.			
		7/9/2004		Case Team actions have reduced the number of schools and additional locations without the required NSLDS transfer student monitoring profiles by over 32%. 735 new profiles have been established reducing the number without required profiles down from 2,356 on 3/17/2004 to only 1,509 on 6/25/2004. Training is on track. The Administrative Actions & Appeals Division has received 62 referrals for administrative action and initiated 13 debarments from 10-01-03 through 7-06-04.	70 % Green
		6/25/2004		Case Team actions have reduced the number of schools and additional locations without the required NSLDS transfer student monitoring profiles by over 25%. 603 new profiles have been established reducing the number without required profiles down from 2,356 on 3/17/2004 to only 1,753 on 6/13/2004. Training materials for the other compliance initiatives will be ready July 9, with training of trainers scheduled for July 27 -29.	68 % Green
9.3		Conduct School Relations initiatives.			
		7/9/2004		HBCU Perkins default has been analyzed and outreach is in the planning stages.	85 % Green
		6/24/2004		HBCU defaulted Perkins project began. The project is tiered over 5 years of historical HBCU Perkins default data off of a handful of schools.	82 % Green
9.4		Conduct the Experimental Sites initiative.			
		7/9/2004		ASEDS received the first draft of the preliminary report on the results from the experiments during academic year 2002-03. Staff in FSA's Operational Performance Analysis/Reporting & Internal Review Group continues to analyze the data submitted by Experimental Sites Schools. Staff will schedule a meeting in July to discuss preliminary findings, particularly areas that are drastically different from the previous year's report.	90 % Green

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>				
		<i>Milestone#</i>	<i>Action Item</i>			
			<i>Status Date</i>	<i>Comments</i>	<i>%Complete</i>	<i>Status</i>
			6/24/2004	No major developments since the last update. Staff in FSA's Operational Performance Analysis/Reporting & Internal Review Group continues to analyze the data submitted by Experimental Sites Schools. The draft report on the results from the experiments during academic year 2002-03 is due to ASEDS by July 2004.	75 %	Green
		9.5	Administer the Quality Assurance program.			
			6/24/2004	On June 24, 2004, the QA Program Staff in ASEDS participated with the Students Channel and Pearson Government Solutions in the Product Readiness Review (PRR) for Phase I of the 2004-05 ISIR Analysis Tool. William Leith, Deputy Director of Application Processing, signed off on Phase I of the product, which will be available to schools by June 30 through FAA Access to CPS on-line. The QA Program Staff have begun developing guidelines, and scheduling training – via Webex in July and August -- for QA schools.	85 %	Green
		9.6	Conduct vulnerability assessment.			
			7/9/2004	The team leader continues to meet with subject matter experts in school eligibility, oversight, and systems processing. Work this reporting period focused on identifying existing and planned ASEDS internal controls for preventing improper payments to Title IV schools. Additional research and interviews with subject matter experts are planned for the next reporting period.	35 %	Green
			6/25/2004	The team leader continues to meet with subject matter experts in the area of school eligibility, oversight, and systems processing. The team leader has also researched the common data architecture deliverables on data quality, security, and privacy and is meeting with subject matter experts about identified vulnerabilities and mitigation strategies. Additional research, and interviews with subject matter experts are planned for the next reporting period.	30 %	Green
10	ADS	<i>Produce school publications and materials.</i>				
		10.1	Annually update and disseminate the Federal Student Aid Handbook.			
			7/9/2004	The project is holding steady at the moment and remains on track thanks to going back green during the last reporting period.	70 %	Green
			6/24/2004	Volume 6 of the Student Aid Handbook has been posted on IFAP. The project is now caught up to where it is supposed to be and is back in the green.	70 %	Green
		10.2	Update and disseminate Direct Loan Program publications such as the Entrance and Exit Counseling Guides and promissory notes.			

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>				
		<i>Milestone#</i>	<i>Action Item</i>			
		<i>Status</i>	<i>Date</i>	<i>Comments</i>	<i>%Complete</i>	<i>Status</i>
		7/9/2004		<p>The PLUS Basics brochure has been designed and final comments have gone back to the Publications group to incorporate into the draft. Management has made decisions on final revisions, and the revised draft will be provided to the Direct Loan Coalition at the 7/12/2004 meeting for a brief review. Following that, it will be submitted to OPA and then printed. The students brochure will be finalized shortly after the PLUS is complete.</p> <p>Currently, there are 52 back-ordered requests for publications or documents at the warehouse. These requests continue to be for the out of stock Direct Loan PLUS Basics brochure. As previously noted, schools have been informed that we are revising the brochure.</p>	77 %	Green
		6/25/2004		<p>The Basics brochures are with the Publications group. The PLUS brochure is awaiting the completion of final revisions before OPA review. The students brochure is being designed. We are hopeful that printing will occur in July 2004.</p> <p>Currently, there are 42 back-ordered requests for publications or documents at the warehouse. These requests continue to be for the out of stock Direct Loan PLUS Basics brochure. As previously noted, schools have been informed that we are revising the brochure.</p>	73 %	Green
13	BS	<i>Enhance program monitoring and oversight.</i>				
		13.1	Default Recovery Rate on FSA-held portfolio 9.5% or more by the end of the fiscal year.			
		7/8/2004		Total non-consolidation recoveries reached \$1.247 Billion, an increase of 24 percent from the same period, thru June 30, in FY03. This represents 7.84 per cent of the FY04 portfolio balance.	80 %	Green
		6/25/2004		Total non-consolidation recoveries have now reached \$1.216 Billion, an increase of 25 percent over the same period, thru June 18th, in FY03.	80 %	Green
		13.2	Update FSA-wide risk management and default prevention inventory.			

Status Date	Comments	%Complete	Status
7/8/2004	<p>The Default Prevention Workgroup met and further refined the definitions of the strategies focused on default prevention. They are:</p> <ul style="list-style-type: none"> ·Communications - Provide information or outreach of a general nature to the general public, lenders, potential borrowers, schools, or other agencies - usually in a group setting. ·Default Collection - Efforts undertaken to encourage voluntary resolution or enforce involuntary resolution of defaulted student aid debt. ·Performance Measures - Involves identifying sources of data and determining how it might be used to calculate a measure of the effectiveness of default prevention activities. ·Program Integrity - To promote integrity in the student loan programs by ensuring that: the correct loan amounts are disbursed to eligible borrowers; borrowers honor loan obligations; FSA collects on defaulted obligations. ·Technical Assistance – Cultivate communications between FSA and a school, servicer, guarantor, or other agency to resolve a specific issue or address training need. These services will most commonly be delivered to individuals or small groups. ·Tools for Aversion - Initiatives and process for mitigating and reducing risk of delinquency and/or default. 	75 %	Green
6/29/2004	The June 2004 target completion date that is currently on the FY 2004 Performance plan is incorrect. The target completion date for this item should be September 2004.	65 %	Green
6/25/2004	The Default Management Workgroup met on June 22. The group finalized definitions and inventory groupings for the overarching strategies.	65 %	Green
13.3 Complete the work on the implementation of the life-time default rate measure.			
7/8/2004	The lifetime default rate measure will be calculated from two different points, one from the date of origination and the other from the date the borrower entered repayment. Validation of the Direct Loan calculation for the lifetime default rate, from the time the borrower enters repayment, will be conducted initially. Subsequently the FFEL calculation will be completed.	80 %	Green
6/25/2004	The Lifetime Default Rate analysis has on the 1994 through 1998 cohort for the Direct Consolidation Loan portfolio has been completed. The analysis on the FFELP portfolio for the same cohorts has begun. The Risk Management Team will be working with NSLDS staff to develop the SQL for extracting NSLDS data for this analysis.	75 %	Green
13.4 Identify new and enhance current delinquency/default prevention tools for the Direct Loan Program.			
7/8/2004	The goal to increase the cure rate on 181-360 day non-consolidated Direct Loans by 1 percent over FY2003 was achieved in April. The goal for FY2004 is 55.1 percent. The actual rate for June 2004 was 59.5 percent.	80 %	Green
6/25/2004	The statistics for the cure rate of delinquent loans are released monthly. The next report on this item will be issued mid-July.	60 %	Green

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>				
		<i>Milestone#</i>	<i>Action Item</i>			
			<i>Status Date</i>	<i>Comments</i>	<i>%Complete</i>	<i>Status</i>
		13.5	Conduct vulnerability assessment.			
			7/8/2004	The independent Verification and Validation (IV&V) team is continuing to review the functional requirements and test plan.	80 %	Green
			6/25/2004	The independent Verification and Validation (IV&V) team is continuing work on the project plan to align it with the new CSB implementation schedule. Once the plan is complete, Borrower Services staff will review it for final approval. The plan will be used for the assessment for the rest of 2004.	80 %	Green
16	FPS	Perform National Student Loan Data System (NSLDS) maintenance and operations activities.				
		16.1	Perform cohort default rate calculations, send, and post.			
			7/9/2004	The next rate calculation is scheduled for Saturday, 7.31.2004, for the official cohort default rates. NSLDS participated in the Default Rate Coordination meeting held on Wednesday, 7.7.2004.	51 %	Green
			6/25/2004	The next rate calculation is scheduled for Saturday, 7.31.2004, for the official cohort default rates.	50 %	Green
		16.2	Prepare guaranty agency fee calculations and send. Review Forms 2000 reasonability data against summarized NSLDS data.			
			7/9/2004	The next LPIF calculation is scheduled for Friday, 8.13.2004.	75 %	Green
			6/25/2004	The next LPIF calculation is scheduled for Friday, 8.13.2004.	75 %	Green
		16.3	Review, evaluate, and prepare guaranty agency NSLDS data integrity improvements reports and benchmarks.			
			7/9/2004	The June Guaranty Agency Benchmarks were completed, reviewed and distributed. The edit passage rate for the month dropped slightly to 98.14%.	76 %	Green
			6/25/2004	The June benchmark reports will be available during the second week in July.	72 %	Green
		16.6	Provide monitoring functionality of GA and lender reasonability on a monthly basis.			
			7/9/2004	Work on this task order began on Monday, 6.28.2004. The detail design documentation from the previous contractor will be used for this task order. Programming for GA reasonability should begin shortly. Lender reasonability requirements gathering began on Thursday, 7.1.2004. Work on lender reasonability is being coordinated with Data Strategy and Oracle 11i work.	58 %	Green

FSA No	Area	Action Item	Milestone#	Action Item	Status Date	Comments	%Complete	Status
					6/25/2004	The proposal for the task order was accepted by FSA and is awaiting approval from the contract review board.	56 %	Green
19	FPS	Perform maintenance and operations activities for the Financial Partners Data Mart.						
			19.1	Provide a quarterly status report on ways to improve effectiveness and efficiency of Data Mart review process.				
					7/9/2004	FP staff continues to validate the data mart, (several minor changes were recommended.) June report submitted.	87 %	Green
					6/25/2004	The Region Directors will be re-evaluating the lender and GA scorecard.	85 %	Green
			19.2	Quarterly evaluation of use and value added to the guaranty agency and lender review processes.				
					7/9/2004	Form 2000, LaRS, and NSLDS June data was loaded with no discrepancies. PEPS feed contained a record with a deficiency code of "9654", this record was not loaded and the issue is being researched. June report submitted.	85 %	Green
					6/25/2004	FP Operations team has received FY01 and FY02 data. The data was loaded with no discrepancies.	80 %	Green
			19.3	Monitor Data Mart feeds in order to provide accurate, concise and timely data to users.				
					7/9/2004	FMS has now requested FPDM Ops to create a CR to only send unique record each month.	90 %	Green
					6/25/2004	A meeting was held with FMS Operations to discuss: loan repayment value, current reimbursement rates and lender fee data. This data will be sent to the data mart within the next 4 weeks.	85 %	Green
20	FPS	Perform Financial Partners Portal operations activities.						
			20.1	Monitor and evaluate web page hits to drive future postings to portal.				
					7/9/2004	The LEAP/SLEAP page on the portal has been revised (several items have been added such as Performance Report, 2004-005 Application, LEAP and SLEAP at a glance). June report submitted.	95 %	Green
					6/25/2004	A meeting was held to verify and validate the requirements for a new LEAP/SLEAP page on the portal.	93 %	Green
			20.2	Maintain current and relevant information to financial partners' user community.				

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		20.3	7/9/2004 The Contractor is still researching this issue. A recommendation will be presented to the team on July 8th. June report submitted.	90 %	Green
			6/25/2004 A meeting was held with the contractor to discuss ways to avoid having the "Whats New" page limitation removed, if possible.	88 %	Green
			Obtain/evaluate feedback from financial partners' user community on value of information posted on the Financial Partners Portal.		
			7/9/2004 A more visible link will be added to the portal, this link will included items such as Forms 2000, LAP and LARs instruction.	97 %	Green
			6/25/2004 The team is working with FMS on posting several new items (survey announcement, instruction on creating a lender/servicer report).	95 %	Green
21	FPS	<i>Perform Leveraging Educational Assistance Partnership/ Special Leveraging Educational Assistance Partnership (LEAP/SLEAP) activities.</i>			
		21.3	Review and approve applications from states. Obligate, generate, and mail grant award notifications to states.		
			7/9/2004 All applications received were processed. Grant award notifications were scanned to PDF and forwarded electronically. There were five states and three territories that did not apply for 2004-2005 funding. New Mexico, one of the states, has been granted exception to the deadline due to turnover at the state and intends to apply.	100%	Green
			6/25/2004 89% of all potential entities have submitted applications. After following up with states to ensure that all potential entities have had the opportunity to apply, two additional states may submit applications. Turnover at the state was the reason for non-response. FP staff is working with these states to ensure opportunity for funding. Currently, 36 of those states that have submitted applications have been processed and approved. FP staff is processing the remainder of the received applications.	70 %	Green
22	FPS	<i>Perform Voluntary Flexible Agreement (VFA) activities.</i>			
		22.2	Prepare performance measure assessment and benchmarking reports.		
			7/9/2004 Evaluation of the best sources for the data to feed the performance measures was completed the week of June 28th and the draft report will be forwarded for comments on Friday, 7.9.2004.	95 %	Green
			6/25/2004 Evaluation of the best sources for the data to feed the performance measures in anticipated to be completed the week of June 28th and a draft reporting will be forwarded for comments the week of July 5th.	92 %	Green
		22.3	Evaluate new applications for VFA.		

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		<i>Status Date</i>	<i>Comments</i>	<i>%Complete</i>	<i>Status</i>
25.1		Participate and provide Financial Partners Channel support for ED audit.			
		7/9/2004	In addition to the already completed audit work with the five GAs, Ernst & Young (E&Y) has requested an additional three months (April through June 2004) of subrogated and receivable download data from the GAs as well as FSA. FP will begin to coordinate the E&Y request with all effected parties.	85 %	Green
		6/25/2004	Ernst & Young (E&Y) has completed all five scheduled GA site visits. The New Mexico site visit concluded on Thursday, 6.10.2004 with no findings mentioned during the closing conference. During the post GA site visit phase, E&Y will review all work papers to determine if there will be any official findings to report. FP continues to assist E&Y on collecting residual outstanding requests from the five GAs.	85 %	Green
25.2		Prepare and conduct program reviews of guaranty agency and lenders/servicers. Use results to determine technical assistance, future monitoring and oversight needs. Coordinate the interpretation of the code of Federal regulations with all elements of the Department of Education that include legal, policy, CFO, general managers and COO in performing our reviews and assessing liabilities.			
		7/9/2004	During this reporting period a two-week program review of the Rhode Island guaranty agency was concluded, as was a CRI review of Wells Fargo. A two-week review of the Nebraska guaranty agency is in progress.	60 %	Green
		6/25/2004	During this reporting period a two-week program review of the South Carolina guaranty agency was concluded and the first week of a two-week review at the Rhode Island guaranty agency was completed. An updated Compilation of Lender and Servicer Review Findings and Observations Report was issued.	55 %	Green
25.3		Analyze and collect third-party audit findings. Use results to determine technical assistance, future monitoring and oversight needs. Utilize PEPS to integrate findings.			
		7/9/2004	Completed draft summary report of audit findings including corrective actions taken.	98 %	Green
		6/25/2004	Continued Work in progress - Staff continuing to respond to lenders' questions and request for guidance concerning lender audit guidelines and procedures. Staff is also continuing to review A-133 GA compliance audits and resolve accordingly. In addition, FY03 lender audits are being received by FP for review and resolution (if applicable).	94 %	Green
25.4		Utilize GA/lender scorecards to reduce risk and improve review process. Review and evaluate use of guaranty agency and lender scorecards.			
		7/9/2004	The Regional Directors have integrated the GA scorecard into the FY05 planning and review of Guaranty Agencies. Actual scores were utilized in presenting the data. This is a major milestone in using the scorecard. While improvements will be made to the GA scorecard it is now considered usable. The lender scorecard is still being improved by the DMIT group and the contract hired to improve the functionality of the scorecard.	80 %	Green
		6/25/2004	The proposed meeting for Washington, DC has been cancelled. Efforts to update scorecards will be done via conference calls as in the past. Regional Directors will have team leads write up a supplemental section that analyses the GA scorecard with review findings to help validate performance metrics. This will be used as internal information within Financial Partners.	72 %	Green

<i>FSA No</i>	<i>Area</i>	<i>Action Item</i>			<i>%Complete</i>	<i>Status</i>	
		<i>Milestone#</i>	<i>Action Item</i>	<i>Status Date</i>	<i>Comments</i>		
		25.6	Conduct vulnerability assessment.				
				7/9/2004	Work on this task order began on Monday, 6.28.2004. The contractor will conduct the study within NIST standards.	19 %	Green
				6/25/2004	The proposal on the task order was accepted by FSA and is awaiting contract office written approval.	15 %	Green
45	EPMS	Mature Enterprise-wide Procurement Plan.					
		45.1	Complete market research to resolve plan issues.				
				6/30/2004	Appropriate market research was completed in order to update the Enterprise Procurement Plan.	100%	Complete
				6/25/2004	Met with CIO staff and have agreed to use Gartner to perform a 6-week strategic market research effort. The effort will not begin until at least the week of 19 July.	70 %	Yellow
		45.2	Synch Plan w/BIG End State Vision.				
				6/25/2004	Plan is complete.	100%	Complete
47	EPMS	Implement enterprise contract performance monitoring measures against new systems contract awards.					
		47.1	Incorporate CSB into enterprise process.				
				6/25/2004	Completed	100%	Complete
		47.2	Incorporation of FEBI into process by September 30, 2004.				
				7/9/2004	This is a continuous requirement and will carry over until the next FY.	80 %	Green
				6/25/2004	Monitoring FEBI status. The progress and status will remain at Yellow until FEBI has reached a point that permits incorporation into the process. No change from last reporting period.	45 %	Yellow
48	EPMS	Continuously update and monitor procurement internal controls.					

FSA No	Area	Action Item	Milestone#	Action Item	Status Date	Comments	%Complete	Status
			48.2	Establish reporting process to monitor vendor performance.				
					7/9/2004	Proposals for Contractor support are due 7/09/04. This is a continuous requirement and will carry over until the next FY.	80 %	Green
					6/25/2004	Contractor support has reached the proposal stage. Full implementation of the process and reporting vendor performance will extend beyond September 2004, as new acquisition initiatives such as IPM take flight.	50 %	Yellow
54	AWSS	Deliver workforce development and support programs.						
			54.1	Continue Intern Program.				
					7/9/2004	We've had several meetings with FSAU to customize the FSA Traditions training for the interns. This training will be held on Friday the 16th. I'm developing a survey for the interns to get feedback from them about FSA and their internship experience. I've also ordered and passed out display boards for the interns to use for our end of the summer "Intern Fair" which highlights their accomplishments and knowledge gained from working for us.	80 %	Green
					6/25/2004	We're on track for completing our success measures. We had approximately 500 applicants apply for the 35 summer intern positions. We have renewed our contract with MonsterTrak based on the level of interest and superior candidates that were available this year. We are developing a survey and working with FSA University to conduct a special FSA Traditions training that will address our first success measure regarding the interns obtaining valuable insight into what we do at FSA. We have hired 16 interns that are working in the office of the CIO, thereby addressing our second success measurement of students providing technological support in the work place	75 %	Green
			54.2	Conduct FSA Orientation.				
					7/9/2004	No activity to report.	90 %	Green
					6/25/2004	Revisions will be made to selected materials of the FSA New Employee Orientation Program. The FSA NEOP Website Design Team met on June 23, 2004 to discuss the type of information to be placed on the site and agreed on a target date for completion of test site. Preview of the new FSA New Employee Orientation Program video was re-scheduled for June 28, 2004.	90 %	Green
			54.3	Implement results of One-ED Competitions.				
					7/12/2004	FSA HR learned in early July that ED has requested an extension of time to select a vendor for the HR/Training competition. This may leave FSA with less than enough time to implement any decision resulting from an award.	25 %	Yellow

6/25/2004	On June 15, 2004, the Department officially announced its decision to award the payment processing contract to the Department's MEO proposal. We anticipate that this decision will impact FSA employees and have made initial contact with the Department's Human Resource Advisor (HRA) to discuss the impact on FSA employees and facilitate the implementation of the award decision. The initial implementation date of June 2004 was premised upon the expectation that the Department would award the contracts for HR/Training and Payment Processing on the projected dates. The initial award decisions were expected in December of 2003, but were postponed until March, 2004. Since then, the March, 2004 deadline has been postponed until June 2004. Implementation of changes required by competitive sourcing decisions will likely require 90 days or more to develop, negotiate on, and implement. Based on this, we are adjusting the completion date on this to project an end of fiscal year (September 30, 2004) completion date.	25 %	Yellow
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54.4 Update Skills Catalog/Learning Tracks.

7/9/2004	On July 7 the IPC approved a WSS business justification for entering into an interagency agreement with the Training and Management Assistance program of OPM. This will enable FSA U to develop learning tracks in FSA business knowledge and New Supervisor training as soon as the IA is approved. Additional proofreading/refining is currently being performed in order for the catalog to accurately represent all the skills, knowledges, and functions performed by each unit with particular attention to reorganization of ASSEDS. A second meeting was held on June 25 to brainstorm ideas to prepare for the creation of an online Skills Catalog tool, followed by a meeting on June 28 to map ideas discussed at both meetings.	90 %	Green
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6/25/2004	Team presented a brief presentation to the Management Council on Friday, June 4. A draft copy of the Skills Catalog was sent to each area for a final review on June 4 with a deadline of June 11 for comments. We are still striving to receive back a complete set of comments as of June 24. A focus meeting was held on June 23 and another group is scheduled for June 25. The meetings focus on developing an online Skills Catalog tool and we are asking the group to suggest what the tool would need to do in order for it to be useful to all staff.	85 %	Yellow
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54.5 Implement Workforce Alignment Strategy.

7/12/2004	Initial negotiation sessions were held with the union on June 30 and July 1. While we have made progress, we don't yet have an agreement with the union. We are continuing to work with OPM on our request for VERA/VSIP authority.	94 %	Yellow
6/25/2004	The union has provided FSA with both a data request related to the ASSEDS reorganization as well as their proposal for our negotiations, which are now scheduled to begin on June 30, 2004 in Washington, DC. On June 21, 2004, the Secretary signed our request for VERA/VSIP authority and transmitted it to OPM. The approval process took longer than anticipated and we have determined that implementation of this reorganization can occur no earlier than August 22, 2004. Based on this, we are adjusting the completion date on this to August 2004.	94 %	Yellow

54.6 Update the FSA Human Capital Plan - reflecting the mission-critical challenges, workforce needs and plans for recruiting, retaining, developing and motivating staff.

FSA No	Area	Action Item					
		Milestone#	Action Item	Status Date	Comments	%Complete	Status
				6/25/2004	The Draft Human Capital Plan is in the final phases of editing and will be presented to the Chief Operating Officer during the week of June 28, 2004. On June 24, 2004, WSS managers presented it's FY05 funding request in support of the Human Capital Plan to the Decision Support Group (DSG).	75 %	Green
55	AWSS	Perform facilities management activities.					
		55.3	Administer records management.				
				6/21/2004	Completed after bi-weekly report submitted on 06/10/04.	100%	Complete
61	CIO	Implement Enterprise Data Strategy initiatives.					
		61.7	Continue to build on Phase I by developing a detailed vision on FFEL/enrollment data flow, gaps/impact of Common Services for Borrowers (CSB), electronic Case Management and Oversight (eCMO), National Student Loan Data System (NSLDS), and electronic Campus-based systems.				
				7/9/2004	No Change.	66 %	Green
				7/2/2004	Received the signed cover letter/Contracting Office approval for deliverable 152.1.1 Data Strategy Target Vision FFEL and Student Enrollment Data Flow Option Analysis on Tuesday, June 29th.	66 %	Green
				6/25/2004	Received comments from Pam Eliadis on Friday, June 18th and submitted Revision 1 of 152.1.1 Data Strategy Target Vision FFEL and Student Enrollment Data Flow Option Analysis on Wednesday,	63 %	Green
				6/18/2004	Met with Pam Eliadis on Thursday, June 10th to review deliverable 152.1.1 Data Strategy Target Vision FFEL and Student Enrollment Data Flow Option Analysis. Comments are due on this deliverable by Friday, June 18th.	60 %	Green
		61.9	Develop the detail Data Quality Execution Plan.				
				7/9/2004	No Change.	66 %	Green
				7/2/2004	Received the signed cover letter/Contracting Office approval for deliverable 152.1.10a Data Quality Management Support Report I on Wednesday, June 23rd.	66 %	Green
				6/25/2004	Held meeting on June 22nd to discuss how data standards fit into the data quality process, and review material discussed from the meeting with EPA on Tuesday, June 15th.	63 %	Green

FSA No	Area	Action Item					
		Milestone#	Action Item	Status Date	Comments	%Complete	Status
				6/18/2004	Received approval from Jane Holman on deliverable 152.1.10a Data Quality Management Support Report I. Still waiting on the signed cover letter	60 %	Green
		61.10	Develop a holistic XML Management Plan.				
				7/9/2004	Continued supporting the XML Registry/Repository in production.	61 %	Green
				7/2/2004	Received the signed cover letter/Contracting Office approval for deliverable 152.1.8 XML Registry/Repository Production Readiness Review (PRR) Report on Wednesday, June 23rd.	61 %	Green
				6/25/2004	Continued supporting the XML Registry/Repository in production.	58 %	Green
				6/18/2004	Received approval from Holly Hyland on deliverable 152.1.8 XML Registry/Repository Production Readiness Review (PRR) Report. Still waiting on the signed cover letter.	55 %	Green
		61.11	Implement the Standard Student Identification Methodology (SSIM), as defined by the FSA enterprise, as a pilot on renewal applicants.				
				7/9/2004	The following will happen within the next couple of months: Finalize analysis of the effectiveness of current SSIM algorithms for correction sources. Begin to modify the SSIM algorithms to implement findings, and provide possible solutions to exception conditions. Additionally, begin to analyze the change notification process, with emphasis on the volume of notifications that will be generated, and automation necessary to maintain current functionality. There will be a trading partner status meeting on Wednesday, July 14, 2004.	70 %	Green
				6/25/2004	No Change.	65 %	Green
62	BS	Begin the implementation of Common Services for Borrowers (CSB).					
		62.2	Begin implementing Phase 1 of the FSA-approved transition plan.				

FSA No	Area	Action Item					
		Milestone#	Action Item	Status Date	Comments	%Complete	Status
				7/6/2004	Contracts - ED Contracts Office is continuing discussions with ACS regarding FSA's role in reviewing and ACS's obligation to provide information related to the CSB design. Development - Phase 1 is comprised of 5 separate Releases. Four releases are in various stages of testing. The schedule for the testing is being monitored closely. Infrastructure - All data communications circuits and routers are now scheduled for installation by July 26, 2004. Operations - ACS has implemented warm transfer capabilities between all of the CSB call centers. The next step will be to have highly trained and technology enabled Universal Agents to answer the majority of call center questions and reduce the need for the warm transfer. Oversight – Nothing new to report. IV&V - This item is also reported in milestone 13.5. The independent Verification and Validation (IV&V) team is continuing to review the functional requirements and test plan.	75 %	Yellow
				6/25/2004	Contracts - Nothing new to report. Development - Nothing new to report. Infrastructure - Data communications circuits and the call center integration network routers will be delivered before June 25th. The Sprint circuit will be connected June 25, 2004. The goal is to finish most of the circuit/router connect by July 23, 2004 (the Sprint connect will be completed July 26, 2004). FSA/CSB team will continue work on the Network management capabilities plan. Operations - Nothing new to report. Oversight - The business case for CSB was presented to the IPC on May 26, 2004 and the IPC approved the request for additional funding for FY04 and initial funding requests for FY05 and FY06. IV&V - This item is also reported in milestone 13.5. The independent Verification and Validation (IV&V) team is continuing work on the project plan to align it with the new CSB implementation schedule. Once the plan is complete, Borrower Services staff will review it for final approval. The plan will be used for the assessment for the rest of 2004.	60 %	Green
63	ADS	Improve school partner oversight.					
		63.1	Implement Integrated Partner Management (IPM) system.				
				7/9/2004	The title and scope of milestone 63.1 needs to be changed in conjunction with changes that need to be made to milestone 63.6. See milestone 63.6 for details.	80 %	Green
				6/25/2004	See milestone 63.6 for details on the conceptual design of the IPMS by the ILSC contractor, Grant Thornton.	80 %	Green
		63.6	Select competitively a vendor to perform the conceptual design and development of the IPM system.				

FSA No	Area	Action Item					
		Milestone#	Action Item	Status Date	Comments	%Complete	Status
				7/9/2004	Work continues towards selecting competitively a vendor to perform the conceptual design of the Integrated Partner Management Solution (IPMS). Feedback on the proposal from the ILSC (Grant Thornton) was provided, a follow up response was received, and the follow up response and revisions are currently being reviewed. Award is expected to occur within the next few weeks.	80 %	Green
					The second part of this milestone--the development of the IPMS--will not be completed by the target completion date of 8/30/2004. It was an oversight on our part to not have requested a scope change for this milestone at an earlier point in time because it was not a realistic expectation. At this time, however, we are requesting a scope change. Milestone 63.6 needs to be changed to "Select competitively a vendor to perform the conceptual design of the Integrated Partner Management Solution (IPMS)."		
				6/25/2004	Proposal received from ILSC (Grant Thornton) on 6/23/2004. Proposal is being reviewed.	80 %	Green
		63.8	Procure the design of a workflow tool for SEC.				
				7/9/2004	At this time, we request that this milestone be cancelled. It is premature to be able to procure a workflow tool for SEC. There is nothing additional to be done on workflow other than the IPMS high level (conceptual) design. Sequencing Plan will determine the order of solution components.	73 %	Green
				6/25/2004	Report has been issued from FEBI requirements. Report will be reviewed within the next 2 weeks.	73 %	Green
70	ADS	Increase Student Financial Aid program awareness.					
		70.1	Expand federal student aid awareness and outreach program.				
				7/9/2004	This Milestone has been rolled into the Front End Business Integration (FEBI) Small Business Initiative. Market research is complete.	25 %	Green
				6/25/2004	This Milestone has been rolled into the Front End Business Integration (FEBI) Small Business Initiative. Market research is complete.	80 %	Green
		70.2	Develop and implement long-term mass marketing strategy.				
				7/9/2004	ASEDS Management Council briefed. Draft Task Order complete.	25 %	Green
71	ADS	Reengineer EDEExpress.					
		71.3	Implement Return to Title IV Web Release.				

<i>Status Date</i>	<i>Comments</i>	<i>%Complete</i>	<i>Status</i>
7/9/2004	<p>The list of issues has been agreed upon with the contractor. Pearson provided a schedule, based on new requirements, with FSA Acceptance Testing scheduled for August 16th through the 20th. A testing team has been put together and the PRR is tentatively scheduled for early September. The System of Records Notice (SORN) is awaiting sign off by management at FSA, and then it will be posted to the Federal Register for a thirty-day comment period. The anticipated completion of the clearance process is by late August. This product is non-year specific and delaying the posting will not impact schools adversely. There is currently a PC product that is available. An adjusted date for project completion has been requested, based on the revised schedule. We request that the completion date be changed to September 30th.</p>	95 %	Yellow
6/25/2004	<p>The list of issues has been agreed upon with the contractor. Pearson provided a schedule, based on new requirements, with FSA Acceptance Testing scheduled for August 16th through the 20th and posting on September 12th.</p> <p>An adjusted date for project completion has been requested, based on the revised schedule. We request that the completion date be changed to September 30th.</p> <p>Completion of the System of Records Notice (SORN) continues through the clearance process with an anticipated completion in late August.</p> <p>This product is non-year specific and delaying the posting will not impact schools adversely. There is currently a PC product that is available. However, we would like to post the product before the 04-05 academic year begins in the fall of 2004.</p>	95 %	Green